

Category Management Support Services (CMSS) Multiple Award BPA
Q&A Template
ITQ Attachment 3

Reference (Doc, Page #, & Paragraph)	Question	GSA Response
CMSS BPA Quote Findings for Confer, Volume I	For each SOW section, please define what constitutes a finding of “strength” and “significant strength” so offerors can provide more targeted experience information.	A significant strength is defined as an aspect of the quote that appreciably increases the likelihood of successful contract performance. A strength is defined as an aspect of the quote that increases the likelihood of successful contract performance.
N/A	Given the amount of modifications backlog current being executed by the MOBIS program office with the migration to the PSS Corp schedule, Quoters are experiencing longer than normal wait/approval times for labor category modifications. If a Quoter is applying for labor categories that would, with their approval, resolve deficiencies identified in GSA’s review (and outlined in the Quoter’s “Quote Findings” attachment, and the Quoter can provide proof of the modification submission, will the Government remove the deficiency rating for those labor categories?	No, the Government will not accept pending modifications. All changes to the revised quote shall be finalized before the revised quote submission deadline. However, the (CMSS BPA) Contracting Officer has agreed to send an email to the applicable FSS POC to REQUEST any awaiting modification be expedited - should a Quoter identify to the (CMSS BPA) Contracting Officer a pending modification exists.
Volume I	Would the Government clarify the “significant weakness” rating listed in the Quote Findings document? The example appears to be in compliance with the Q&A and ITQ, including evaluation criteria, and demonstrates the capability requested. If the rating stands, would the Government please provide an example of which element of the evaluation criteria is not met, such as whether there is a dollar threshold?	A Significant Weakness represents the Government's findings and is a flaw in the quote that appreciably increases the risk of successful performance. It signifies the Quoter did not demonstrate experience with the technical capabilities necessary, as it relates to the SOW. Confidence ratings are based on the overall confidence level the Government has that a Quoter will successfully accomplish the tasks outlined in SOW after assessing all findings from Factor 1 examples as they relate to the SOW.

GENERAL SERVICES ADMINISTRATION (GSA)

Federal Acquisition Service (FAS)

Southeast Sunbelt Region 4

**INSTRUCTIONS TO QUOTERS (ITQ) and
EVALUATION CRITERIA**

CONTRACT TYPE: Multiple-Award Blanket Purchase Agreement (BPA)

REQUEST FOR QUOTATION (RFQ): ID04150049

PROJECT TITLE: CATEGORY MANAGEMENT SUPPORT SERVICES (CMSS)

RFQ ISSUE DATE: 1/8/16

Submit any questions via email to susan.humann@gsa.gov and dustin.teal@gsa.gov no later than **Close of Business 1/13/16** per Q&A Template - ITQ Attachment 3.

ISSUING OFFICE:

GSA/FAS (4QFAC)

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AND

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Quoters shall not contact the client or any other Government employee regarding this procurement without the prior approval of the GSA Contracting Officer. Unless otherwise expressly specified herein, all references in this ITQ to "quote" are to quotes for the potential BPA awards under this BPA ITQ.

1.0 REQUEST FOR QUOTES (RFQ): This is a RFQ, under FAR Subpart 8.4 ordering procedures, to establish multiple BPAs for GSA/FAS with a five (5) year Period of Performance (PoP). The resulting BPAs are intended to significantly reduce administrative costs by acquiring these services from numerous GSA Schedule contractors. The BPAs will allow GSA to save procurement time, realize economies of

scale through high-volume ordering, and establish long-term relationships with contractors.

- 1.1 SCOPE:** The CMSS BPA scope is bound by The Professional Services Schedule (PSS) 00CORP, Special Item Number (SIN) 874-1. SIN 874-1 is mandatory for quote submission. However, in order to allow Quoters desiring to utilize Contractor Teaming Arrangements (CTA) more flexibility in their teaming arrangements, Training Services SINs 874-4 may be included as part of a total solution. Ancillary Supplies and/or Services SIN 874-5 is also optional and not required for quote submission.

Note: GSA is going through Schedule Consolidation during the time of this RFQ. Currently there are two sets of SINs (example - C874-1 and 874-1); however, the scope of both SINs is identical. Those SINs identified with a "C" prefix are anticipated to be deleted on January 1, 2016, and Schedule holders' SINs will be consolidated with the applicable SINs without the "C" prefix. Given this information is anticipatory; all SINs with a "C" prefix have been removed from the RFQ documents. However, if this does not happen by the time of RFQ closing, it is the Quoter's responsibility to ensure the correct SINs (with or without the "C" prefix) are used throughout the quote.

- a. **874-1 Integrated Consulting Services** - Contractors shall provide expert advice and assistance in support of an agency's mission-oriented business functions. Services covered by this SIN include:
- Management or strategy consulting, including research, evaluations, studies, analyses, scenarios/simulations, reports, business policy and regulation development assistance, strategy formulation, and expert witness services
 - Facilitation and related decision support services
 - Survey services, using a variety of methodologies, including survey planning, design, and development; survey administration; data validation and analysis; reporting, and stakeholder briefings
 - Advisory and assistance services in accordance with FAR 37.203
- b. **Optional - 874-4 Training Services:** Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration Learning Management, Internships Proposed courses shall be commercially-available off-the-shelf training and/or educational courses that are delivered via an Instructor-led (i.e. traditional classroom setting or conference/seminar) and/or web-based (i.e. Internet/Intranet, software packages and computer applications) system. Courses shall have a defined course title, length of time (i.e. hours, days, semesters, etc.), description of material to be taught (i.e. syllabi, table of contents, etc.), and whether materials are included in the price. (i.e. books, pamphlets, software, etc.). Support materials not included may be offered under SIN 874-5. C874-9
- c. **Optional - 874-5 Ancillary Supplies and/or Services:** For orders that complete work for a project that is solely associated with the supplies and/or services purchased under this Schedule. This SIN EXCLUDES purchases that are exclusively for supplies and/or services already available under another Schedule.

Special Instructions: The work performed under this SIN shall be associated with existing SIN(s) that are part of this Schedule. Ancillary supplies and/or services shall not be the primary purpose of the work ordered, but be an integral part of the total solution offered. Ancillary supplies and/or services may only be ordered in conjunction with or in support of supplies or services purchased under another SIN(s) of the same Schedule. Quoters may be required to provide additional information to support that their proposed Ancillary supplies and/or services are commercially offered in support of one or more SINs under this Schedule.

- 1.2. 100% Small Business Set Aside:** The Government in accordance with FAR subpart 8.405-5 intends to establish multiple-award BPAs with Small Businesses on GSA's 00CORP Schedule under the SINs listed in Section 1.1 based on the standards identified in Sections 2 and 3. The Government's intentions are to award approximately ten (10) CMSS (Small Business) BPAs, but reserves the right to award more or less than ten (10) or make no awards.

1.3 Prime Contractor/Subcontractor Arrangement (Prime/Sub):

The BPA quote may be submitted on behalf of a Prime contractor from a Prime/Sub Arrangement(s) in which the Prime must be a Small Business 00CORP Schedule holder with SIN 874-1 at the time of RFQ closing. SINs 874-4 and 874-5 are optional for the Prime. The Prime shall provide signed buyer/seller agreement(s) from all subcontractors identified in Factor 1 - Demonstrated Technical Capabilities in order to provide a total solution and shall be submitted in accordance with (IAW) the guidance found in section 2. Under a Prime/Sub relationship, the Prime may utilize subcontractors as part of their total solution for Factor 1 – Demonstrated Technical Capabilities; however, all CMSS BPA Labor Categories quoted (from ITQ Attachment 2 – Pricing Matrix) shall be from the Prime's GSA Schedule. Quotes received from concerns that are not small business concerns or do not contain SIN 874-1 shall be considered noncompliant and will be rejected.

At the task order level, the Prime shall agree that at least 50 percent of the cost of contract performance incurred for personnel shall be expended for employees of concerns.

1.4 CTAs:

The BPA quote may be submitted on behalf of a CTA in which all CTA members must be Small Business 00CORP Schedule holders with at least one (1) of the SINs from section 1.1 above by RFQ closing. The CTA shall provide signed CTA arrangements from all team members identified in Factor 1 - Demonstrated Technical Capabilities in order to provide a total solution and shall be submitted in accordance with (IAW) the guidance found in section 2. CTAs may also utilize Subcontracting arrangements. The CTA shall provide signed buyer/seller agreement(s) from all subcontractors identified in Factor 1 - Demonstrated Technical Capabilities in order to provide a total solution and shall be submitted in accordance with (IAW) the guidance found in section 2. Under a CTA/Sub relationship, the CTA may utilize subcontractors as part of their total solution for Factor 1 – Demonstrated Technical Capabilities; however, all quoted CMSS BPA Labor Categories (from ITQ Attachment 2 – Pricing Matrix) shall be from the CTA's GSA

Schedules. Quotes received from concerns that are not small business concerns or do not contain SIN 874-1 shall be considered noncompliant and will be rejected.

At the task order level, the CTA shall agree that at least 50% of the cost of contract performance incurred for personnel shall be expended for employees of concerns.

GSA Schedule CTAs differ from Prime/Sub Arrangements under Schedule contracts. In Prime/Sub arrangements, the relationship is very tightly defined and controlled by the Prime contractor; whereas, in CTAs, the roles and responsibilities are defined by the team, as accepted by the Government. This information can also be found at <http://www.gsa.gov/cta>. The following chart summarizes key differences:

Contractor Team Arrangement (CTA)	Prime Contractor / Subcontractor Arrangement
Each team member must have a GSA Schedule contract.	The prime contractor must have a GSA Schedule contract.
Each team member is responsible for duties addressed in the CTA document.	The prime contractor cannot delegate responsibility for performance to subcontractors.
Each team member has privity of contract with the government and can interact directly with the government.	Only the prime contractor has privity of contract with the government and can interact with the government. The prime contractor is responsible for its subcontracting activities.
The ordering activity is invoiced at each team member's unit prices or hourly rates as agreed in the task or delivery order or GSA Schedule BPA.	The ordering activity is invoiced in accordance with the prime contractor's GSA Schedule contract, including any applicable price reductions.
Total solutions, otherwise impossible under individual GSA Schedule contracts, can be put together quickly and easily.	The prime contractor is limited to the supplies and/or services awarded on its GSA Schedule contract.

Table 1: CTA and Prime/Sub

Prime/Sub Arrangement and CTA for this RFQ shall be defined as described in the above chart. If a CTA is to be used, the Quoter shall provide a signed copy of the CTA agreement(s) with their quote and identify the GSA Schedule contract number(s) for each team member; failure to supply such CTA agreements before the deadline for quotes shall make the quote ineligible for award. If any Subcontractors are to be utilized in the teaming arrangement, the Quoter shall provide a signed buyer/seller agreement with terms and conditions of the arrangement as part of their quote by the RFQ closing.

- 1.5 BPA and CLIN STRUCTURE:** BPA Ordering Period will consist of a five (5) year PoP. Task Orders will only be placed against active BPAs, and may contain options that extend beyond the BPA Ordering Period. Orders issued prior to but not completed before the BPA ends shall **comply** with the terms and conditions as established in the contractor's GSA Schedule contract. Task Order level requirements may contain Firm Fixed Price

(FFP), Cost Reimbursement, and/or Time and Material (T&M) CLINs for performance-based CMSS. Cost Reimbursement CLINs will only be included in orders where Travel or Ancillary Supplies and/or Services are anticipated and shall be utilized for acquiring only Travel or Ancillary Supplies and/or Services; cost type task orders are not permissible under GSA Schedules.

- 1.6 REQUIREMENT DESCRIPTION:** For reporting purposes all BPAs will be identified under NAICS Code 541611, as the majority of the requirements are expected to be supported through SIN 874-1. At the Task Order level, the NAICS Code will be selected by the Ordering Contracting Officer (OCO) based upon the majority of requirements identified in Task Order SOW.

2.0 INSTRUCTIONS TO QUOTER AND EVALUATION CRITERIA

- 2.1 GENERAL INSTRUCTIONS:** This acquisition is being conducted in accordance with FAR 8.4 Federal Supply Schedules under FAR 8.405-2 procedures. This is not a FAR Part 15 negotiated competition. This acquisition is being conducted under Best Value Trade-Off evaluation procedures as follows:

Best Value – Tradeoff Process seeks to select Quoters with the best value to meet the Government’s need. Best value is defined as the expected outcome of an acquisition that, in the Government’s estimation, provides the greatest overall benefit in response to the requirement in accordance with FAR 2.101. The best value will be determined by comparing differences in the value of non-price features with differences in price to the Government. In making this comparison, the Government is more concerned with obtaining superior technical, non-price features than with making an award at the lowest overall total evaluated price. However, the Government will not make an award at a significantly higher overall total evaluated price to achieve slightly superior technical, non-price features. Therefore, Factor 2 - Price is not expected to be the controlling factor in the selection of CMSS BPA vendors, but the degree of importance of Factor 2 - Price as a factor could become greater depending upon the equality of the quotes for other factors evaluated. To be eligible for a BPA, the Quoter must meet all requirements of the RFQ, conform to all required terms and conditions, and include all required certifications and agreements. The Government reserves the right to make selections based upon the initial quote submissions so a Quoter should submit its best terms in the initial quote.

A Quoter is solely responsible for completing and submitting the required documents in sufficient detail to allow the Government to assess the quote based on all the evaluation factors in this RFQ. Quoters shall thoroughly examine all SOW tasks, ITQ information, and SOW and ITQ attachments prior to submitting the Quote. The Government will base its evaluation on the information presented in the quote. Failure to comply with any instruction or requirement from the RFQ shall result in the quote being eliminated from award consideration. The Government will not pay any Quoter for any costs or expenses associated with the preparation of their quote. The Government may also determine to make no award.

Quoters submitting any proprietary or restricted information or data shall mark it as such. ITQ Attachment 2 - Pricing Matrix shall be marked "For Government Use Only", as it will be published internally within the Government to Category Management Requiring Activities for Task Order requirements. The Government assumes no liability for disclosure or use of unmarked information or data and may use or disclose the unmarked information or data for any purpose. Unless restricted, information and data submitted in response to this request may become subject to disclosure to the public pursuant to the provisions of the Freedom of Information Act (5 U.S.C. 551).

Quotes shall set forth full, accurate, and complete information as required by this RFQ package (including Attachments). The penalty for making false statements in quotes is prescribed in 18 U.S.C. 1001. The only method by which any term of this RFQ may be modified is by a formal amendment to the RFQ generated by the issuing office. No other communication, whether oral or in writing will modify or supersede the terms of this RFQ.

2.2 INSTRUCTIONS FOR QUOTE SUBMISSION

Volume	Factor	Page Limit	Required ITQ Attachment
Cover Letter	N/A – (Eligible or Not Eligible)	No Limit	–
Volume I	Demonstrated Technical Capabilities w/Experience	20 Pages	ITQ Attach. 1 – Factor 1 Format (from Quoter)
Volume II	Price	No Limit	ITQ Attach. 2 – Pricing Matrix (from Quoter)

Table 2: Quote Submission Format and Required Attachments

The Cover Letter Volume and Volume I – Demonstrated Technical Capabilities w/Experience shall be submitted in 8-1/2" X 11" Microsoft Word and/or readable PDF format page format with Times New Roman 12 point font. ITQ Attachment 3 – Pricing Matrix shall be submitted in MS Excel format with Times New Roman 12 point font. However, Volume III – Price may contain 8-1/2" X 11" Microsoft Word and/or readable PDFs with Times New Roman 12 point font for additional supporting documentation, such as weekly, monthly or yearly schedule rate conversions based on the level of effort from the IGE (2080 hour/year) or any other relevant schedule/pricing information.

The minimum quote acceptance period is **180 calendar days** after the required date for RFQ. The Quoter is required to submit the below information in identifiably separate and distinct parts. If a Quoter fails to submit any of the required information as stated in this RFQ, they will be considered Not Eligible and will be eliminated from award consideration. The Government reserves the right to confer with Quoter to clear up quote details if necessary in the Government's discretion and may also determine to make no award.

SUBMISSION OF QUOTE: All quotes must contain the information necessary to satisfy the factors in the identified format. All quotes shall be submitted via the e-Buy portal. Failure to submit the quote in e-Buy by the RFQ closing date and time will result in

exclusion from award consideration. All Quoters (Primes and all CTA members) shall register in GSA's web-based ordering system AASBS IT-Solution Shop (ITSS) prior to RFQ closing.

NOTE: AASBS requires that information under the contract number in the ITSS be an exact match with the information in the System for Award Management (SAM), <https://www.sam.gov>. An award cannot be made if the information in each system does not match. Contact the AASBS helpdesk at 877-472-4877 should you have questions or need assistance with registration in ITSS.

COVER LETTER VOLUME:

The cover letter is a standalone volume and must be signed by an official(s) authorized to contractually commit the Quoter. Each of the items below (A-H) must be provided in the Cover Letter Volume in order to be determined eligible for award consideration. If any item is not clearly labeled and addressed in the Cover Letter Volume, the Quoter will be deemed Not Eligible and will not be evaluated. If a CTA or prime contractor/subcontractor arrangement is quoted, the burden is exclusively on the Quoter to clearly establish in its quote the specific nature of the relationships between the parties. I.e., identify which parties are utilizing a CTA, and which parties are utilizing a prime contractor/subcontractor arrangement. For the DEMONSTRATED TECHNICAL CAPABILITIES WITH EXPERIENCE factor, if a Quoter is relying upon capabilities and experience of entities such as CTA members, acquired companies, divisions, subsidiaries or critical subcontractors then the Quoter's Cover Letter Volume shall provide the Government with a clear understanding of each entity's proposed involvement and how each entity will contribute meaningfully to the ability to meet the requirements under this solicited BPA. Additionally, the Quoter shall clearly detail in its quote evidence of a meaningful, binding commitment between the prime and the subcontractor/affiliate regarding performance of the BPA requirements; such evidence may include but is not limited to copies of agreements/contracts.

The Quoter shall provide the Cover Letter Volume with the following:

- A. Names, addresses, e-mails and phone numbers of Quoter's submission representatives
- B. List the System for Award Management (SAM) Business Names of vendors involved with the following:
 - 1. Type of Relationship: Prime Contractor, Total CTA, or CTA with Subcontractors
 - 2. The DUNS Number(s) and Cage Code(s) of members involved (Prime, CTA members, and Subcontractors)
 - 3. Applicable GSA Schedule Names, Numbers, and SINS for the Prime or all CTA vendors involved
 - 4. A copy of the Prime and CTA members' GSA Schedule Price List(s) highlighting the applicable Schedule labor categories being quoted for CMSS BPA Labor Categories
- C. The signed CTA(s) from the CTA relationship and/or the buyer/seller agreement(s) from Prime/Sub relationship

- D. Narrative explaining how the Prime or CTA will maintain 50% of Task Order requirements for instances where subcontractors are quoted; to be used in conjunction with Factor 1 – Demonstrated Technical Capabilities
- E. Conflict(s) of Interest and Mitigation Plan(s) if applicable (See section 3.0 below)
- F. Response to GSAM 552.203-72 from Prime and all CTA members (See section 6.1 below)
- G. Identification quote and all attachments are valid for 180 calendar days (or more) after quote submission
- H. Quoter shall verify that their electronically-posted size status certifications were current, accurate, and complete “as of the date of quote”

VOLUME I – DEMONSTRATED TECHNICAL CAPABILITIES WITH EXPERIENCE:

For Volume I, the Quoter shall ensure the demonstrated technical capabilities examples are numbered and organized in the same order as SOW sections 3.0 – 4.6.1. The list of SOW task requirements include:

- 3.0 Project Management Support
 - 3.1.1 Spend Analysis
 - 3.1.2 Agency Analysis
 - 3.1.3 Market Analysis
 - 3.1.4 Risk Analysis
 - 3.1.5 Category Strategy Development
 - 3.2.1 Total Cost Management
 - 3.2.2 Demand Management
 - 3.2.3 Supplier Management
 - 3.2.4 Strategic Sourcing
 - 3.2.5 Content Development/Management
 - 3.2.6 Hallway Adoption Support
 - 3.2.7 Technical Writing
 - 3.3.1 Benchmarking
 - 3.3.2 Performance Tracking
 - 3.4.1 Data Management and Analytical Support
 - 3.5.1 Category Expertise Support
 - 3.6.1 Supplemental Change Management Support
 - 3.7.1 Supplemental Communications Support
 - 4.1.1 Strategic Direction and Vision
 - 4.1.2 Training
 - 4.1.3 Spend Under Management
 - 4.1.4 Support Spend Analysis
 - 4.2.1 Category Management Expertise Support
 - 4.3.1 Support Ad Hoc Analyses
 - 4.4.1 Overarching Change Management Support
 - 4.5.1 Overarching Communications Strategy and Support
 - 4.6.1 PMO Benchmarking

Demonstrated Technical Capabilities with Experience for sections 3.0 – 4.6.1 shall consist of no more than one example per SOW section. An example may be used more

than one time if it applies to more than one section of the SOW. The Quoter shall select the most appropriate example from the Prime, Subcontractor or CTA member's previous project within the last five years from time of RFQ that best represents the Prime or team's capability for each section of the SOW. At a minimum each Demonstrated Technical Capability example shall address at a minimum the Prime, Sub or CTA member's company name, direct level of effort and involvement on the project and attributed performance results (capabilities demonstrated, key deliverables, outcomes, successes, improvements, etc.).

Identifying Data for sections 3.0 – 4.6.1 shall correlate to the applicable Demonstrated Technical Capabilities with Experience examples and address each example's Contract/Order Number, Dollar value of Contract/Order, Period of Performance, Role – Prime, Sub, or CTA member, POC's Name, Email, and Phone Number. **The POC shall not be from the company being used for the Demonstrated Technical Capabilities example.** The Government is not obligated to, but reserves the right to verify any and all information with the POCs to validate the information provided is accurate. Any adverse discrepancies found between the example provided in the quote and the information provided from the POC may reduce the overall confidence level rating for Factor 1. See ITQ Attachment 1 for the required Factor 1 Format.

A Quoter may elect to submit and rely upon capabilities and experience of entities such as CTA members, acquired companies, divisions, subsidiaries or critical subcontractors so long as the Quoter's Cover Letter Volume provides a clear understanding of how each entity will contribute meaningfully to the ability to meet the requirements under this solicited BPA. The Government will not consider the capabilities or experience of any particular entity, unless the Quoter clearly details in its quote Cover Letter Volume the involvement of the entity's performance of the solicited BPA requirements. Additionally, the Government will not consider the capability and experience of any particular entity unless the quote supplies evidence of a meaningful, binding commitment between the prime and the subcontractor/affiliate/entity concerning the performance of the BPA requirements.

VOLUME II – PRICE:

Mandatory ITQ Attachment 2 - Pricing Matrix is the required format for price quote submission and shall be submitted in MS Excel format. ITQ Attachment 2 - Pricing Matrix **shall be marked for "Government Use Only"**; as it will be published internally within the Government to Category Management Requiring Activities. The awarded CMSS BPA Labor Rates establish the maximum allowable rates for Task Order requirements. In the event future schedule rates are less or are reduced the Quoter may agree to a bilaterally modification to incorporate those lower rates into the BPA. The Pricing Matrix shall be completely filled out and include:

TAB 1:

Column B: The quoted GSA Schedule labor categories and applicable vendors' Schedule and SIN (e.g. Data Analyst Jr. – Company X 874-1) to fulfill all CMSS BPA Labor Categories, and identification of member's role (Prime or CTA Member).

Column F: Confirmation each quoted labor category from Schedule meets the minimum CMSS BPA Skill Set (Position Description, Experience Level, and Education Level).

Columns G – K: The quoted BPA Labor Rate for each CMSS Labor Category shall be the maximum allowable rate throughout the term of the BPA. In the event future schedule rates are less or are reduced the Quoter may agree to a bilaterally modification to incorporate those lower rates into the BPA. It's encouraged the quoted CMSS BPA Labor Rates be discounted from the rates awarded on Schedule. In the event a vendor's awarded Schedule rates do not extend through year five (5) or 2/26/22, the vendor is still required to quote rates for all years of the BPA term.

Column L: Estimated Level of Effort from the IGE for Evaluation Purposes Only – DO NOT ALTER.

TAB 2:

Column B: The quoted GSA Schedule Labor Categories and applicable vendors' Schedule and SIN (e.g. Data Analyst Jr. - CompanyX 874-1) to fulfill all CMSS Labor Categories, and identification of member's role (Prime, Sub or CTA Member).

Column C - H:

- Awarded GSA Schedule labor rates through year five (5) or 2/26/22.

-Or-

- Indication Schedule rates are not currently awarded (at time of BPA quote submission) by typing "Not Currently Awarded".

The Price submission shall not include prices that exceed the Quoter's current GSA Schedule contract rates. Therefore, the Quoter shall provide the most recent Schedule Price List(s) from all members involved (Prime or all CTA members) and identify which team member's Schedule labor category, SIN, and Schedule is being quoted for each CMSS Labor Category in the Pricing Matrix by highlighting the applicable Schedule labor categories quoted. Any schedule rate other than hourly shall conform to an hourly CMSS BPA Labor Rate (Pricing Matrix identifies 2080 Hours = 1 FTE), and the calculation and pricing basis for determining the conformed rate shall explained in full detail as Additional Supporting Documentation for the Price Volume, see first paragraph of section ITQ Section 2.2.

All quoted labor categories must be on their applicable Schedule Price List(s) at the time of RFQ closing. The Government will also use GSAAAdvantage to verify the Quoter's approved GSA Schedule contract labor categories and rates. Quoters shall ensure its Schedule labor categories and rates posted on GSAAAdvantage are accurate and up to date by the time of RFQ closing. Failure to submit the most recent Price List(s) will result in the quote being ineligible for award.

Note 1: Due to the potential volume of this requirement, Quoters are strongly encouraged to offer substantial discounts from its awarded GSA Schedule contract rates. Because the goal of the Contracting Officer is to award approximately (10) BPAs based on initial quotes, there may be no additional opportunity for Quoters to revise BPA pricing submissions or offer further discounts prior to BPA awards.

Note 2: The Quoter shall provide a Schedule labor category for each CMSS Labor Category. The Quoter shall also quote BPA Labor Rates for all CMSS Labor Categories and years of the BPA in Tab 1. Any quote missing any one of Pricing Matrix elements identified in TAB 1 or TAB 2 sections above will result in the quote being ineligible for award.

2.3 EVALUATION CRITERIA: Factor 1 is significantly more important than Factor 2.

Factor 1 – Demonstrated Technical Capabilities with Experience: In evaluating this factor, the Government will evaluate the Quoter’s demonstrated technical capabilities and experience with respect to each section of the SOW (3.0 – 4.6.1). The Government reserves the right to verify any and all information with the POCs from the Identifying Data column to validate the information provided is accurate. Any adverse discrepancies found between the example provided in the quote and the information provided from the POC may reduce the overall confidence level rating for Factor 1.

The Quoter will be assigned an overall confidence level rating based on the amount of confidence the Government has that the Quoter will successfully accomplish tasks outlined in the SOW based on the extent and degree of technical capabilities and experience from examples outlined in ITQ Attachment 1 – Factor 1 Format. Each SOW section is of equal importance. Because subcontractors can only perform up to 50% of the overall work on any given task order, the Government will take into account the Prime/CTA’s strategy to be able to perform 50% of task order requirements (required as part of Cover Letter Volume, see item D) in addition to the number of Subcontractor examples vs. Prime or CTA examples for the overall confidence rating. The Confidence Level ratings for Factor 1 are as follows:

RATING	ABB.	DESCRIPTION
High Confidence	HC	Evaluation of the factor leaves <u>virtually no doubt</u> that the Quoter will successfully perform the required effort. Little or no Government oversight is expected to be required in achieving the required level of performance.
Significant Confidence	SC	Evaluation of the factor leaves <u>little doubt</u> that the Quoter will successfully perform the required effort. Minimal Government oversight is expected to be required in achieving the proposed level of performance.
Medium Confidence	MC	Evaluation of the factor leaves <u>some doubt</u> that the Quoter can successfully perform the required effort, however it is believed that there is a high probability that the Quoter can perform successfully. Some Government oversight is expected to be required to meet the contract requirements.
Little Confidence	LC	Evaluation of the factor leaves <u>substantial doubt</u> that the Quoter will successfully perform the required effort. Substantial Government oversight or intervention is expected to be required in achieving the proposed level of performance. Changes in the Quoter’s existing processes may be necessary to achieve contract requirements.
No Confidence	NC	Evaluation of the factor leaves <u>extreme doubt</u> that the Quoter will successfully perform the required effort, regardless of the degree of Government oversight.

Table 3: Factor 1 Confidence Level Ratings

Factor 2 - Price: In determining the total evaluated price, the estimated level of effort of each CMSS Labor Category from the Independent Government Estimate (IGE) (Tab 1, Column L) will be applied to the quoted rates for all years of the BPA. The total evaluated price will be used in the trade-off analysis to determine the best overall value to the Government for CMSS BPA awards. The Government will review, at minimum, each proposed awardee's quoted Schedule labor category and determine if it meets the minimum Skill Set requirements (Position Description, Years of Experience, and Level of Education).

- 3.0 ORGANIZATIONAL CONFLICT OF INTEREST (OCI):** All actual or potential OCI situations shall be handled in accordance with FAR Subpart 9.5. Quoters addressing OCIs shall include all CTA members and Subcontractors in connection with its quote submission.

If a Prime, CTA member, or Subcontractor is currently providing support or anticipates providing support to the Government that presents an actual or potential OCI with the requirements for this acquisition, or if they are currently performing or anticipates performing any other work for the Government under any quote for any solicitation relating to this requirement, the Quoter shall include in its quote submission: (1) a statement identifying and describing the actual or potential OCI, and (2) a proposed OCI mitigation plan detailing the Quoter's recommendation for how the potential OCI may be avoided, neutralized and/or mitigated. If the Government determines an OCI cannot be avoided, neutralized, or mitigated, the Quoter may be excluded from consideration for award. This information shall be disclosed in the COVER LETTER VOLUME. **If an actual or potential OCI does not apply, acknowledgement of such is still required.**

4.0 ITQ ATTACHMENTS:

ITQ Attachment 1: Factor 1 Format
ITQ Attachment 2: Pricing Matrix
ITQ Attachment 3: Q&A Format

4.1 SOW ATTACHMENTS:

SOW Attachment 1: BPA Ordering Guide
SOW Attachment 2: Terms and Conditions
SOW Attachment 3: SOW TO Template
SOW Attachment 4: FAR 51 Deviation Ordering Guide

5.0 PROVISIONS AND CLAUSES INCORPORATED BY REFERENCE: TBD

REFERENCE	Title	Date
52.219-6	Notice of Total Small Business Set-Aside	Nov 2011
52.219-13	Notice of Set-Aside of Orders	Nov 2011
52.219-14	Limitations on Subcontracting	Nov 2011
552.212-4	Contract Terms and Conditions—Commercial Items Alt. II	July 2015
552.232-39	Unenforceability of Unauthorized Obligations	July 2015

6.0 PROVISION INCORPORATED BY FULL TEXT:

Quoters (including all CTA Members) shall include their response to GSAM 552.203-72 Provision in their Cover Letter Volume.

GSAM 552.203-72 Representation by Corporations Regarding an Unpaid Delinquent Federal Tax Liability or a Felony Conviction under any Federal Law (DEVIATION) (JAN 2015)

(a) In accordance with Sections 744 and 745 of Division E of the Consolidated and Further Continuing Appropriations Act, 2015 (Public Law 113-235, December 16, 2014), none of the funds made available by Division E of the Consolidated and Further Continuing Appropriations Act, 2015 or any other Act, may be used to enter into a contract action with any corporation that-

(1) Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless the agency has considered suspension or debarment of the corporation and has made a determination that this further action is not necessary to protect the interests of the Government, or

(2) Was convicted of a felony criminal violation under any Federal law within the preceding 24 months, where the awarding agency is aware of the conviction, unless the agency has considered suspension or debarment of the corporation and has made a determination that this action is not necessary to protect the interests of the Government.

(b) The Contractor represents that-

(1) It is ☐ is not ☐ a corporation that has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability.

(2) It is ☐ is not ☐ a corporation that was convicted of a felony criminal violation under any Federal law within the preceding 24 months.

(End of Provision)

GENERAL SERVICES ADMINISTRATION (GSA)

Federal Acquisition Service (FAS)

Southeast Sunbelt Region 4

**MULTIPLE-AWARD
BLANKET PURCHASE AGREEMENT (BPA)
STATEMENT OF WORK**

Title: Category Management Support Services (CMSS)
Order ID: ID4150049
Date: 1/8/2016

Points of Contact:

Senior Contracting Officer (SCO)

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1.0 Background

In Fiscal Year (FY) 2014, the Federal Government managed over \$428 Billion in contract spending. This amount far exceeds that of most Fortune 100 companies. GSA/FAS addresses a significant portion of Federal Government spending, and there is even more room for growth in FAS spend coverage. The mission of the FAS is to support customers with Government-wide contract vehicles and sources of supply, eProcurement tools, and assisted services. FAS is one of the largest buying organizations in the United States and as such has an opportunity to re-shape the federal acquisition process by better leveraging the Government's buying power to obtain more value for less.

Currently, FAS supports over 500 departments and agencies making purchases. FAS analyses of Government spend has provided evidence that Government purchasing is

fragmented with uncoordinated customer management, supplier management, and spend management activities. This fragmentation can drive costly redundancies and inefficiencies in procurement actions, contracting vehicles, and overall acquisition and supply efforts. Continued reductions in acquisition personnel add to the challenge, creating risk of inefficiencies and costs due to lost subject matter expertise, contractual knowledge, and disrupted internal networks for coordination and knowledge sharing.

FAS is playing a vital role in helping the Government act as a more unified entity to achieve the benefits of being one of the largest buying organizations in the United States. In early 2014, FAS established a priority of implementing Category Management, which ties together activities that precede and follow the acquisition process and apply a strategic focus on overall value and total cost of ownership. The FAS initiative to implement Category Management has significant support from the Office of Management and Budget (OMB) Office of Federal Procurement Policy (OFPP), which is developing a parallel plan to implement Category Management Government-wide. FAS implementation of Category Management will help the Federal Government act as one, buy as one, and reap the resulting benefits by aggregating spend to achieve best-in-class pricing, improving and standardizing specifications and service levels, increasing the productivity of supplier relationships, and leveraging shared solutions.

FAS has three (3) roles in Category Management:

Role 1: FAS is transforming its business strategy by integrating Category Management into FAS operations. The organization is currently undergoing a realignment to better align the organization to support the business model. Each of the FAS categories is expected to operate according to the model as shown below in **Table 2** and to align their offerings to meet the needs of their categories.

Role 2: FAS is charged with being the Category Management Program Management Office (PMO) for Category Management and provides overall program support to FAS and Government-wide category teams in the governance structure, and facilitates development and implementation of business rules and processes.

Role 3: FAS is also charged with establishing a Government-wide Category Management PMO as a shared service to provide support to the Government-wide Category Managers for the ten (10) general categories for the development, execution and ongoing-management of their category strategies by providing data analytics, general project support, community support, content management and subject matter expertise. This will help ensure Category Management becomes a fully integrated, mature process, within the federal Government.

FAS activities are aligned under business portfolios, regions, and integrator offices. Category Management is being implemented in the three business portfolios: Office of Integrated Technology Services, Office of General Supplies and Services and the Office of Travel, Motor and Vehicle Services.

FAS initially defined seventeen (17) category teams with their locations as shown below in **Table 1**.

	Category Name	Geographic Region
1	IT Software	Washington, DC
2	IT Hardware	Washington, DC; Atlanta, GA
3	IT Consulting	Washington, DC
4	IT Security	Washington, DC
5	IT Outsourcing	Washington, DC
6	Telecommunications	Washington, DC
7	Administrative Support	New York, NY
8	Workplace Environment	Philadelphia, PA
9	Facilities and Tools	Kansas City, MO
10	Security, Scientific, Hospitality, Prefab Buildings, and Building Materials	Ft. Worth, TX
11	Professional Services	Seattle , WA
12	Motor Vehicles	Washington, DC
13	Card Services	Washington, DC
14	Travel	Washington, DC
15	Employee Relocation	Washington, DC
16	Freight	Washington, DC
17	Package Delivery	Washington, DC

Table 1 - Category Distribution by Region

OFPP has established ten (10) Government-wide categories and FAS is currently undergoing an organizational assessment to determine the merits of realigning the FAS seventeen (17) categories to the ten (10) Government-wide categories.

Category Management is an approach that drives ongoing improvement and management of offerings for defined commodities (products and services) that behave in a similar manner. It involves clearly defining categories of spend and identifying related spend and solutions; collectively enhancing category analysis and expertise; providing acquisition, supply and demand management solutions to meet Government-wide objectives; and using metrics, benchmarking, and best-practice sharing to drive ongoing performance improvement.

1.1 Implementation

FAS has created a Category Management Operating Model. The Operating Model is built on a continuous process of strategy development, execution, and performance management. The process involves regular review of Category Management deliverables and results to refine strategy and ensure progress toward category goals and objectives. Categories will progress through each phase of the Operating Model at a varying pace given their different characteristics and levels of Category Management maturity. For each phase and stage in the Category Management lifecycle, the categories may tailor the activities and tools they use, the analysis they produce, and the performance levers they focus on to achieve category goals. Category teams will be formed by the category manager. The respective teams are the primary collaborative bodies where much of the daily Category Management activities occur. The composition of the team is largely built upon members that understand the Government's requirements as well as the customer, industry and market dynamics surrounding a category. The following roles and responsibilities are typically found on the Category team:

- **Subject Matter Expert:** Individual(s) with technical and business expertise about acquisition and the subject category, able to provide insight into best practices, guidance on category strategy, stakeholder needs assessment, and specific content, including any applicable sustainability content, for hallway posting.
- **Content Manager:** Primary point of contact within a category team responsible for updating and exchanging information, and leading content development for respective Hallways.
- **Technical Writer:** Individuals with the capability to develop and deliver objective content, written in plain language that resonates with customers and helps them find relevant answers.
- **Data Analysts:** Responsible for gathering, aggregating, and analyzing spend, agency demand, market, and supply chain data; and translating the data into actionable category intelligence.
- **Community Manager Role:** Manage communications and address user questions, comments and feedback in category working groups, on the acquisition gateway hallway, and support awareness and understanding of category offerings in various communities of practice.

The Common Acquisition Platform (CAP) is the overall IT platform to support the Category Management business model. Among other digital services (under development), CAP will house the Acquisition Gateway which provides a single web location for the collection, interaction, management and use of shared category content. Specific category content will be stored in category hallways and will include

valuable information, tools and resources to the acquisition workforce. Content includes: best practices, contract terms and conditions, transactional information (such as prices paid data), white papers, market research, and information on procurement alternatives. The purpose of category hallways is to:

- Collect and store intelligence, data, and advice about a particular category of products and services in one centralized location for agencies to review, use and refine
- Deliver relevant and useful category-centric information to various levels of agency stakeholders (acquisition, program management, and end users)
- Offer objective comparisons (based on the category) about specific acquisition/requisition methods and contract vehicles to help purchasing agencies find the best solution

Table 2 depicts the high-level phases and steps in the Category Management lifecycle.

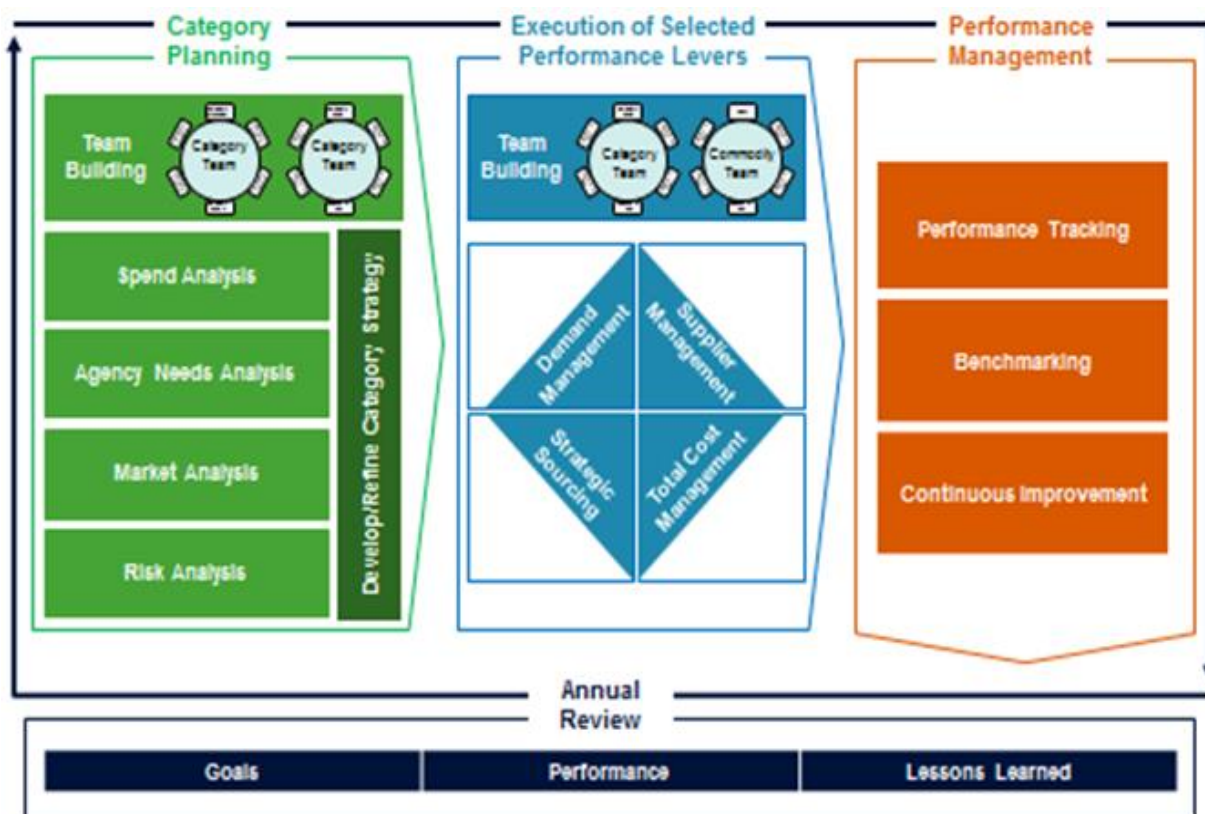


Table 2 - Category Management Operating Model

CATEGORY PLANNING (See Section 3.1)

Steps and tools to assemble the data, internal and external input, and analysis needed to formulate, pressure-test, and plan key strategies to improve category performance.

- Spend Analysis

- Agency Analysis
- Market Analysis
- Risk Analysis
- Category Strategy Development

PLAN EXECUTION of SELECTED PERFORMANCE LEVERS (See Section 3.2)

Deployment of the category strategy, using various performance levers to achieve expected returns. Not all performance levers will necessarily be used for each category strategy, but Category Teams must take into account all of the potential levers.

- Total Cost Management
- Demand Management
- Supplier Management
- Strategic Sourcing
- Content Development/Management

PERFORMANCE MANAGEMENT (See Section 3.3)

Ongoing data gathering, analysis, and reporting to understand performance in context (e.g., is a 10% cost price savings good or bad given overall market changes?), using the information to make informed decisions and drive enhancements to the Category Management process and execution over and above pre-planned gains.

- Performance Tracking
- Benchmarking

1.2 PURPOSE

The purpose of this BPA is to assist FAS with support, knowledge, and expertise to increase their maturity in Category Management and to support the implementation of Category Management across the federal Government. The support provided within this BPA shall be managed and completed in a way that enables contractor knowledge to be transferred to Government staff as necessary. Examples of knowledge sharing includes, but is not limited to: development and coaching on process flows and/or standard operating procedures, documenting and sharing processes as they are created and refined, providing both the raw data and the analysis, along with steps taken to derive analysis.

2.0 SCOPE

The scope of this BPA includes direct, day-to-day, support of FAS Category Management teams and program support across all Category Management specific efforts as stated above. The scope also includes support to the PMO and tools such as Acquisition Gateway that supports the Category Management program. The work is to be performed for GSA/FAS throughout multiple regions and locations. The following sections identify the available tasks that may be tailored for each requirement and ordered at the Task Order level.

3.0 PROJECT MANAGEMENT SUPPORT

The contractor shall provide all necessary personnel, administrative, financial, and managerial resources necessary to support requirements outlined. This includes the management and oversight of contractor personnel, subcontractors and teaming arrangements/partners; necessary to satisfy the requirements identified in the BPA Task Order. The contractor shall provide the following Project Management support throughout the period of performance (PoP) to include but not limited to:

- Coordinate a Kickoff Meeting within ten (10) days of the BPA Task Order identifying roles, responsibilities, workflow process, quality controls, required tasks and expected deliverables.
- Prepare a Task Order Monthly Status Report (due dates defined by the Contracting Officer's Representative (COR)) which at a minimum includes: BPA Task Order Number & Title, Reporting Period, Accomplishments and Significant Events, Current and Anticipated Problems with Suggested Mitigation Strategies, Brief Summary of Activities Planned, Resource and Demand Management, Open and Anticipated Travel, any Staffing Changes, and a List of any Current and Due Deliverables (to include status, date submitted/to be submitted, expected delivery date and any comments).
- Convene and coordinate technical status meetings (frequency defined by the COR).
- Prepare and maintain a Project Management Plan (PMP) which includes Gantt style detailed project management plans at the Task Order level.
- Prepare Quality Control Plan (QCP) at the Task Order levels (where applicable).
- Prepare travel requests and trip reports as necessary.
- Notify the Contracting Officer (CO), and COR of any technical, financial, personnel, or general managerial problems encountered throughout the life of the contract and individual Task Orders
- Create and manage tracking tools
- Provide facilitation and meeting support

3.1 CATEGORY PLANNING

The contractor shall directly support FAS' Category Management efforts through assistance in the steps and tools to assemble the data, internal and external input, and analysis needed to formulate, pressure-test, and plan key strategies to improve category performance, understanding, and increase level of knowledge maturity.

The general functions to support Category Planning include and are not limited to the following:

- 3.1.1 Spend Analysis: Tasks include gathering and compiling data and removing duplications; removing non-category spend, analyzing and assessing data and identifying opportunities.
- 3.1.2 Agency Analysis: Tasks include identifying key customers; defining the drivers of customer experience; soliciting customer input; pulling together customer facing data; prioritizing customers' decision factors and identifying opportunities for improvement.
- 3.1.3 Market Analysis: Tasks include defining supply market, determining analytical scope and tools, conducting analysis, and developing strategic insights.
- 3.1.4 Risk Analysis: Tasks include identifying potential risks, assessing likelihood and potential impact of risks, and identifying options to reduce risk.
- 3.1.5 Category Strategy Development: Tasks include clarifying goals and targets, assessing and selecting specific options, risk and contingency planning, high level implementation planning, and cost-benefit analyses.

3.2 PLAN EXECUTION

- 3.2.1 Total Cost Management: Tasks include developing a systematic approach to managing cost throughout the lifecycle of an investment.
- 3.2.2 Demand Management: Task include demand management strategies to include, but not limited to: changing buying behaviors, standardizing requirements/specifications or instituting policies and ensuring compliance.
- 3.2.3 Supplier Management: Tasks include supplier management strategies to include, but not limited to: performance measurement and performance improvement plan best practices.

- 3.2.4 Strategic Sourcing: Tasks include, but are not limited to determining opportunities, developing market analyses and commodity profiles, creating strategy and business cases, and post strategic sourcing implementation activities.
- 3.2.5 Content Development/Management- Tasks include, but are not limited to developing and managing the content for the Acquisition Gateway, working with category team and technical experts to develop and post content, developing and manages the process of submitting content for consideration, reviews, and edits, and determining whether content is in line with the overarching category strategy.
- 3.2.6 Hallway Adoption Support: Tasks include analysis, recommendations, and implementation support of adoption strategies for the hallways in the Acquisition Gateway. This includes but is not limited to developing, conducting and assessing usability tests to objectively assess the ability of users to complete hallway tasks.
- 3.2.7 Technical Writing - Tasks include, but are not limited to developing content for a category and translating technical jargon into plain language.

3.3 PERFORMANCE MANAGEMENT

- 3.3.1 Benchmarking: Tasks include industrial benchmarking (Compare FAS w/ comparable industry programs), benchmarking FAS acquisition vehicles and programs by category against industry leaders, and competitive benchmarking (Compare FAS to other US Gov Service Providers). Tasks also include comparison of FAS acquisition vehicles and program to competing federal solutions.
- 3.3.2 Performance Tracking: Tasks include designing and reporting metrics common to Category Management best practices, designing of dashboards and reporting key metrics, and designing and rolling out of the infrastructure and processes to support management of a robust performance management framework.

3.4 DATA MANAGEMENT AND ANALYTICAL SUPPORT:

- 3.4.1 Provide support in developing and managing requirements, data and technical content for IT tools that further Category Management.

The contractor shall provide support to that includes, but not limited to:

- Identify data sources to support Category Management
- In the absence of data, identify alternative sources

- Support gathering of category appropriate data from industries and/or agencies
- Review and support data management activities to ensure quality of Category Management data
- Support definition of technical content for the appropriate Hallways and other GSA IT tools
- Define functional requirements for IT tools needed for Category Management Activities
- Recommend Information Technology tools required to support analytics for categories
- Support big data analytics and technical analyses to support Category Management activities
- Conduct technical market analysis to identify technical trends impacting the category

3.5 CATEGORY EXPERTISE SUPPORT

- 3.5.1 Provide category support that includes, but not limited to knowledge of technical and business expertise about the subject category, insight into best practices, guidance on category strategy, stakeholder needs assessment, and specific category content.

3.6 SUPPLEMENTAL CHANGE MANAGEMENT SUPPORT

- 3.6.1 The contractor shall provide change management support to help Category Management take hold throughout all Category Management initiatives. Change management support includes, but is not limited to:
- Organizational Strategic Planning to support implementations of change management
 - Strategic communications planning and implementation support
 - Stakeholder analysis and persona development
 - Organizational Design
 - Operational Concepts
 - Change Leadership
 - Training
 - Category Management Meeting facilitation

- Coaching and Mentoring
- Transition Impact Analysis and Planning
- Adoption Assessment and Support

3.7 SUPPLEMENTAL COMMUNICATIONS SUPPORT

3.7.1 The contractor shall provide communications support to the Category Teams. Activities include, but not limited to the following:

- Manage communications, user questions, comments, and feedback in category working groups on the acquisition gateway hallway
- Managing employee communications and engagement at the category or portfolio level
- Providing category or portfolio-specific feedback to inform the PMO communications
- Participating in cross-cutting communication meetings
- Aligning other communication initiatives (not related to Category Management) to the Category Management PMO communication efforts to reduce the number of messages and make the existing messages more powerful and relatable to employees
- Leverage the overarching communications plan and stakeholder analysis to develop a category team level plan
- Providing facilitation support at the category or portfolio level

CATEGORY MANAGEMENT PMO SUPPORT

TASKS 4.1 – 4.6 APPLICABLE ONLY TO THE CATEGORY MANAGEMENT PMO
PERFORMED IN WASHINGTON D.C. – GSA CENTRAL OFFICE

4.1 STRATEGIC AND EXECUTION SUPPORT TO CATEGORY MANAGEMENT PMO

4.1.1 Strategic Direction and Vision: Providing support, based on lessons learned, in refining the following existing Category Management governance documents, including but not limited to:

- The FAS Category Management governance structure

- FAS Concept of Operations (CONOPS); and Charter (includes but is not limited to: mission, vision, goals, roles and responsibilities, processes and procedures)
- The FAS Category structure
- Government-wide category structure
- Category Management Operating Model (includes but limited to: templates, tools, training and guidance on all key phases and activities in the Category Management lifecycle)
- Communities of Practices and Charters
- Review current PMO processes and recommend any improvements or processes to manage PMO functions and alignment moving forward

4.1.2 Training: Support the PMO in developing and refining core content for the Category Management Operating Model, including templates, tools, training, and guidance on all key phases and activities in the Category Management lifecycle. This content shall be developed and released incrementally and refined based on category team feedback and lessons learned from initial deployments. Provide coaching based on training to the Category Teams on all phases and steps within the Category Management lifecycle.

4.1.3 Spend Under Management: Support includes, but is not limited to quantifying the amount of spend from Spend Under Management Attributes (Leadership, Strategy, Data, Tools, and Metrics) to measure progress towards achieving Category Management objectives and to achieve best practice concepts used by leading commercial firms and other Governments on an ongoing basis.

4.1.4 Support Spend Analysis: Support the PMO with data cleansing as well as managing any changes in spend categorization and reporting spend numbers and developing reports that provide insights into category strategies.

4.2 CATEGORY MANAGEMENT EXPERTISE SUPPORT

4.2.1 Provide subject matter expertise from resources with former experience in successful reform of Government procurement practices. The expertise support to the PMO includes, but is not limited to providing insights, best practices, and challenges that drive success of the program.

4.3 SUPPORT AD HOC ANALYSES

4.3.1 Support the PMO with data analytics to include, but not limited to:

- Government-wide and agency specific spend analyses
- Actual prices paid and contract pricing analyses
- Analyses in support of business case development
- Analyses in support of performance metrics dashboard development; impact analyses
- Benchmarking analyses

4.4 OVERARCHING CHANGE MANAGEMENT SUPPORT

4.4.1 Support the PMO with developing, maintaining, and implementing a comprehensive change management strategy that includes but not limited to the following:

- Organizational Design/ Alignment
- Stakeholder Impact
- Change Leadership
- Training
- Transition Impact Management
- Government-wide Adoption/ Impact
- Workforce Capability Development Plan

4.5 OVERARCHING COMMUNICATIONS STRATEGY AND SUPPORT

4.5.1 Support the PMO and the Office of Communications and Marketing (OCM) to develop and maintain the overarching communications strategy for the Category Management and Acquisition Gateway initiative. The Contractor shall create, maintain, and disseminate overarching strategy documents that include but are not limited to the following:

- Category Management communications plan
- Stakeholder Engagement Plan
- Category Management editorial calendar
- Category Management message map

- Category Management briefing decks and communications and marketing materials for internal, customer, and industry audiences, and developing responses to internal and external stakeholders.
- Assisting in maintaining a shared collaborative Category Management site.
- Ad hoc communication requests

4.6 Benchmarking

- 4.6.1 The contractor shall compare GSA/FAS processes, practices, products, or service against the best known similar activities of companies that are recognized as industry leaders as well as other federal agencies for the purpose of achieving customer satisfaction, new business opportunities and market share.

SOW Attachments:

Attachment 1: BPA Ordering Guide

Attachment 2: Terms and Conditions

Attachment 3: SOW TO Template

Attachment 4: FAR 51 Deviation Ordering Guide

Category Management Support Services (CMSS) Multiple Award BPA
BPA Ordering Guide
SOW Attachment 1

To Be Used By General Services Administration (GSA) Only

The following instructions will serve as the ordering procedures for GSA / Federal Acquisition Services (FAS) ordering activities for usage of Category Management Support Services (CMSS) Blanket Purchase Agreements (BPAs). FAS/Program Management Office (PMO) and FAS/Assisted Acquisition Services (AAS)/Region 4 reserve the right to modify these ordering procedures at any given time.

General Ordering Procedures

1. The Requiring Agency may utilize their designated Ordering Agency to issue Task Orders under a CMSS BPA or may utilize Region 9 AAS.
2. The Ordering Activity shall review the BPA Statement of Work (SOW) and the Special Item Numbers (SIN) stated in section 2.0 of SOW Attachment 2 - BPA Terms and Conditions.
3. The Ordering Activity shall ensure their requirement fits within the scope of the BPA SOW and SIN(s) prior to requesting quotes from CMSS BPA vendors. The Ordering Activity shall ensure all FAR regulations and internal reviews (e.g. legal review, contract review boards, etc.) are complied with in accordance with (IAW) the Ordering Activity's acquisition policies.
4. The Ordering Activity shall follow the procedures identified in FAR 8.405-3(c) for orders under Multiple Award BPAs.
 - a. Develop a SOW IAW Attachment 3 – SOW TO Template as well as an Independent Government Estimate (IGE) utilizing the CMSS BPA Labor Categories and rates. It's recommended that OCOs use an average labor rate for each labor category by surveying all BPA holders' price lists.
 - b. When developing Task Order requirements, the Requiring Agency shall NOT utilize contractor support to develop IGEs or allow contractors access to the BPA holders' price lists. Furthermore, any information marked proprietary that was obtained from a Government official shall NOT be possessed by a contractor. Agencies should normally prepare their own work statements. When contractor assistance is necessary, the contractor might often be in a position to favor its own capabilities. To overcome the possibility of bias, contractors are prohibited from supplying services acquired on the basis of work statements growing out of their services, unless excepted in accordance with FAR 9.505-2(b)(1); which states if a contractor prepares, or assists in preparing, a work statement to be used in competitively acquiring Category Management Support Services that contractor may not supply the services unless it is the sole source, it has participated in the

Category Management Support Services (CMSS) Multiple Award BPA
BPA Ordering Guide
SOW Attachment 1

- development and design work, or more than one contractor has been involved in preparing the work statement. The evaluation of CMSS BPA task orders for services shall not be awarded to a contractor that will evaluate its own quotes for services, or those of a competitor, without proper safeguards to ensure objectivity to protect the Government's interests. For additional information regarding conflicts of interest, follow the guidance in FAR 9.505, 9.506, and 9.507.
- c. If an ordering activity will be restricting consideration/limiting sources for proposed orders with an estimated value exceeding the micro-purchase threshold, justification must be in accordance with (IAW) FAR 8.405-6(a)(1)(i). For orders exceeding the Simplified Acquisition Threshold (SAT) which require a limited source(s), follow the justification and approval procedures in FAR 8.405-6(c) and posting requirements in FAR 8.405-6(a)(2).
- d. Ensure fair opportunity IAW FAR 8.405-3(c)(2). The suggested method for issuing the Task Order Request for Quote (RFQ) is to utilize GSA e-buy (www.gsa.gov/ebuy reference FAR 8.402(d)) to all small business Contractor Teaming Arrangements (CTA) members and Prime CMSS BPA holders:

CMSS BPA CTA Member or Prime	CMSS BPA Team Lead	PSS 00CORP Number
Artlin Consulting, LLC	Artlin	GS-10F-021BA
Dougherty & Associates, Inc.	Artlin	GS-00F-032CA
Jefferson Consulting Group, LLC	Artlin	GS-23F-8050H
Censeo Consulting Group, Inc.	Censeo	GS-10F-0052R
Privitan Consulting, LLC	Censeo	GS-10F-122AA
E3 Federal Solutions, LLC	E3	GS-00F-151CA
Eagle Hill Consulting, LLC	E3	GS-10F-0083V
Jump Associates, LLC	E3	GS-10F-040AA
Amyx, Inc	E3	GS-10F-0019N
Kaiser Associates, Inc.	Kaiser	GS-10F-0159W
M Powered Strategies, Inc.	M Powered	GS-00F-170CA
Monterey Consultants, Inc.	Monterey	GS-00F-0002Y
Reefpoint Group, LLC	Reefpoint	GS-10F-011BA

- e. When an order exceeds the SAT, ensure fair opportunity IAW FAR 8.405-3(c)(2)(iii). The ordering activity contracting officer shall document the circumstances when restricting consideration to less than all multiple-award BPA holders offering the required supplies and services.
5. The Ordering Activity shall only accept quotes from CMSS BPA Prime vendors and CTA members.

Category Management Support Services (CMSS) Multiple Award BPA
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- a. The quote shall specify which member(s) is performing as the Task Order level Team Lead. The quote shall also state which CTA members and/or Subcontractors will be involved and the percent of resources each member is performing to satisfy the requirements of the Task Order.
 - b. Only CMSS CTA members or CMSS Prime BPA vendors can be named as awardees for a Task Order. Forming new CTAs at the Task Order level that include CTA members outside the established BPA CTA is not permitted.
 - c. If the Ordering Activity receives two (2) or more quotes from the same CTA relationship in response to a RFQ, the Ordering Activity shall only accept the CTA member's quote that was submitted first.
6. The Ordering Activity should establish Firm-Fixed Priced orders to the maximum extent practicable. However, orders placed under BPAs may contain Firm-Fixed Price (FFP), Time and Material (T&M), and/or Cost Reimbursement CLINs. A Cost Reimbursement CLIN is only allowable for the .75% Industrial Funding Fees or when Travel or ODCs under FAR 51 Deviation are anticipated.
7. Ordering Contracting Officers (OCO) have the flexibility to determine fair and reasonable pricing tailored to the Requiring Activity's requirement dependent upon level of competition, risk, uncertainties, complexity, urgency, and contract type. The OCO has the authority and responsibility for the determination of price reasonableness for each individual Task Order requirement. The OCO shall verify at the Task Order level that the price being awarded has been verified against each contractor's Schedule and BPA award document to determine the rates quoted are accurate and the appropriate discount has been applied. Published CMSS BPA Labor Rates at the BPA level establish the maximum allowable rates for Task Order requirements and take precedence over any newly awarded or revised Schedule rate.

Services offered on this BPA are priced at hourly rates for individual labor categories. These labor rates have already been determined fair and reasonable as a condition of the BPA holder's award of the BPA. Therefore, Ordering Activities are not required to make a separate determination of fair and reasonable pricing as it pertains to the labor rate pricing. However, a price evaluation as required by FAR 8.405-2(d) for the "total price" must be made by the OCO. If performance extends beyond the year five (5) CMSS BPA Labor Rates, a separate fair and reasonable price determination for labor rates and total price is required for each year thereafter.

By placing an order against this BPA the Ordering Activity has concluded that the order represents the best value (as defined in FAR 2.101) and results in the lowest overall cost alternative (considering price, special features, administrative costs, etc.) to meet the Government's needs. Although the labor rates negotiated on the BPA have been determined fair and reasonable pricing, ordering activities should seek

Category Management Support Services (CMSS) Multiple Award BPA
BPA Ordering Guide
SOW Attachment 1

additional discounts beyond the stated discount terms established within each BPA before placing an order.

Additionally, Task Orders should only contain those labor categories contained within the BPA unless services under FAR 51 Deviation are anticipated, see Section 9 below. OCOs are responsible for considering the level of effort, mix of labor, and any Off-Schedule Items (if any) quoted to perform a specific task being ordered, and for determining that the total price is reasonable.

After award, Ordering Activities should provide timely notification to unsuccessful Quoters. If an unsuccessful Quoter requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award decision shall be provided.

8. Options may be included in Task Orders with a Period of Performance (PoP) of no more than one year each. Orders issued prior to but not completed before the BPA ends shall comply with the terms and conditions as established in the contractor's GSA Schedule contract. See Section 7 above for additional information.
9. Limitation on Off-Schedule Items or Services (sometimes referred to as "Other Direct Costs" (ODCs), Open Market Items, Incidental Items, Non-Contract Items, and Non-Schedule Items): Off-Schedule Items are supply or commercial support services offered by the Contractor that are not already awarded and priced under the Quoter's FSS contract (or, in the event that the Quoter is utilizing a CTA, not awarded under a CTA member's FSS contract). Off-Schedule items are ancillary in nature and integrally related to the contractor's ability to perform the service being acquired. It includes categories of charges for commercial items or services utilized in direct support of performance of the services in the Task Order. The cumulative total lifetime value (for the base year and all option years) of any and all Off-Schedule Items a Quoter is quoting on a Task Order shall not exceed or be expected to exceed the micro-purchase threshold (FAR 2.101)). If a Quoter quotes Off-Schedule Items or Services in excess of the micro-purchase threshold then that Quoter's quote shall fail to meet terms of the BPA and Task Order RFQ and be rated technically unacceptable. The CMSS BPA vendor's quote must expressly itemize and identify any and all Off-Schedule Items or Services which the Quoter is including in the quote. Also, the Contractor shall maintain files in such a manner that the OCO may review them upon request to ensure price reasonableness compliance for those Off-Schedule Items or Services if any.
10. The CMSS BPA Labor Categories, identified in the award documents of each BPA, are considered bona fide executive, administrative, and professional labor that is exempt from the Service Contract Act (SCA). To the extent that any ancillary labor for services are within the scope of CMSS BPA SOW and subject to the SCA in accordance with FAR Subpart 22.10 and other applicable agency specific regulatory supplements, the

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OCO shall identify such work in the Task Order quote and make a determination as to whether SCA wage determinations are to be applied or not.

11. The OCO for each Task Order shall designate a Contracting Officer Representative (COR) to perform specific administrative or technical functions. The specific rights and responsibilities of the COR for each Task Order shall be described in writing and provided to the Contractor. A COR has no actual, apparent, or implied authority to bind the Government, that responsibility resides solely with the OCO.
12. The Ordering Activity may include agency specific regulations/terms and conditions in the Task Order that do not conflict with the GSA FSS contract or SOW Attachment 2 - BPA Terms and Conditions.
13. The Ordering Activity may utilize the FAR 51 deviation as detailed in SOW Attachment 4 - FAR 51 Deviation Ordering Guide and SOW Attachment 2 - BPA Terms and Conditions.
14. In accordance with FAR 17.502-2(b), the Economy Act does not apply to Task Orders awarded under the authority of 40 U.S.C. 501.
15. The Ordering Activity shall be responsible for administering and closing-out all resulting Task Orders.

Minimum Guarantee and Maximum Ceiling

1. There is no minimum guarantee for CMSS BPAs.
2. There is no maximum ceiling amount for CMSS BPAs or individual Task Orders.

Federal Procurement Data System (FPDS) Recording Procedures

1. CTAs pose unique challenges to FPDS Recording Procedures. While all CTA members of a particular Team have privity to their BPA, only ONE FSS Contract number can be associated with ONE unique BPA number from a system perspective. Due to this system limitation, all CTA members have been assigned a unique BPA number. This does NOT mean each CTA member has a standalone BPA. Each member has its own unique BPA number for FPDS recording purposes only.
2. Regarding how **BPAs** themselves show in FPDS, the awarded Indefinite Delivery Vehicle (IDV) ID is the BPA number and the referenced IDV ID for that BPA number is the CTA member's FSS Contract number.
3. Regarding how **orders** show in FPDS, an order will have its unique number as the Award ID with a referenced IDV ID number which will be a specific BPA number. Ensure that when you issue the Task Order in your purchase order system, you record the correct

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BPA number in FPDS as the IDV ID for the CTA member who is leading the Task Order.

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To Be Used By General Services Administration (GSA) Only

The following instructions will serve as the ordering procedures for GSA / Federal Acquisition Services (FAS) ordering activities for usage of Category Management Support Services (CMSS) Blanket Purchase Agreements (BPAs). FAS/Program Management Office (PMO) and FAS/Assisted Acquisition Services (AAS)/Region 9 reserve the right to modify these ordering procedures at any given time.

General Ordering Procedures

1. The Requiring Agency may utilize their designated Ordering Agency to issue Task Orders under a CMSS BPA or may utilize Region 9 AAS. Region 9's AAS support includes all phases of the acquisition cycle from requirement definition to award and administration to close-out. The Region 9 points of contact are Sheri Torres (sheri.torres@gsa.gov or 310-265-4902) and Andrea Brown (andrea.brown@gsa.gov or 415-522-4555).
2. The Ordering Activity shall review the BPA Statement of Work (SOW) and the Special Item Numbers (SIN) stated in section 2.0 of SOW Attachment 2 - BPA Terms and Conditions.
3. The Ordering Activity shall ensure their requirement fits within the scope of the BPA SOW and SIN(s) prior to requesting quotes from CMSS BPA vendors. The Ordering Activity shall ensure all FAR regulations and internal reviews (e.g. legal review, contract review boards, etc.) are complied with in accordance with (IAW) the Ordering Activity's acquisition policies.
4. The Ordering Activity shall follow the procedures identified in FAR 8.405-3(c) for orders under Multiple Award BPAs.
 - a. Develop a SOW IAW Attachment 3 – SOW TO Template as well as an Independent Government Estimate (IGE) utilizing the CMSS BPA Labor Categories and rates. It's recommended that OCOs use an average labor rate for each labor category by surveying all BPA holders' price lists.
 - b. When developing Task Order requirements, the Requiring Agency shall NOT utilize contractor support to develop IGEs or allow contractors access to the BPA holders' price lists. Furthermore, any information marked proprietary that was obtained from a Government official shall NOT be possessed by a contractor. Agencies should normally prepare their own work statements. When contractor assistance is necessary, the contractor might often be in a position to favor its own capabilities. To overcome the possibility of bias, contractors are prohibited from supplying services acquired on the basis of work statements growing out of their

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services, unless excepted in accordance with FAR 9.505-2(b)(1); which states if a contractor prepares, or assists in preparing, a work statement to be used in competitively acquiring Category Management Support Services that contractor may not supply the services unless it is the sole source, it has participated in the development and design work, or more than one contractor has been involved in preparing the work statement. The evaluation of CMSS BPA task orders for services shall not be awarded to a contractor that will evaluate its own quotes for services, or those of a competitor, without proper safeguards to ensure objectivity to protect the Government's interests. For additional information regarding conflicts of interest, follow the guidance in FAR 9.505, 9.506, and 9.507.

- c. If an ordering activity will be restricting consideration/limiting sources for proposed orders with an estimated value exceeding the micro-purchase threshold, justification must be in accordance with (IAW) FAR 8.405-6(a)(1)(i). For orders exceeding the Simplified Acquisition Threshold (SAT) which require a limited source(s), follow the justification and approval procedures in FAR 8.405-6(c) and posting requirements in FAR 8.405-6(a)(2).
- d. Ensure fair opportunity IAW FAR 8.405-3(c)(2). The suggested method for issuing the Task Order Request for Quote (RFQ) is to utilize GSA e-buy (www.gsa.gov/ebuy reference FAR 8.402(d)) to all small business Contractor Teaming Arrangements (CTA) members and Prime CMSS BPA holders:

CMSS BPA CTA Member or Prime	CMSS BPA Team Lead	PSS 00CORP Number
Artlin Consulting, LLC	Artlin	GS-10F-021BA
Dougherty & Associates, Inc.	Artlin	GS-00F-032CA
Jefferson Consulting Group, LLC	Artlin	GS-23F-8050H
Censeo Consulting Group, Inc.	Censeo	GS-10F-0052R
Privitan Consulting, LLC	Censeo	GS-10F-122AA
E3 Federal Solutions, LLC	E3	GS-00F-151CA
Eagle Hill Consulting, LLC	E3	GS-10F-0083V
Jump Associates, LLC	E3	GS-10F-040AA
Amyx, Inc	E3	GS-10F-0019N
Kaiser Associates, Inc.	Kaiser	GS-10F-0159W
M Powered Strategies, Inc.	M Powered	GS-00F-170CA
Monterey Consultants, Inc.	Monterey	GS-00F-0002Y
Reefpoint Group, LLC	Reefpoint	GS-10F-011BA

- e. When an order exceeds the SAT, ensure fair opportunity IAW FAR 8.405-3(c)(2)(iii). The ordering activity contracting officer shall document the circumstances when restricting consideration to less than all multiple-award BPA holders offering the required supplies and services.

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5. The Ordering Activity shall only accept quotes from CMSS BPA Prime vendors and CTA members.
 - a. The quote shall specify which member(s) is performing as the Task Order level Team Lead. The quote shall also state which CTA members and/or Subcontractors will be involved and the percent of resources each member is performing to satisfy the requirements of the Task Order.
 - b. Only CMSS CTA members or CMSS Prime BPA vendors can be named as awardees for a Task Order. Forming new CTAs at the Task Order level that include CTA members outside the established BPA CTA is not permitted.
 - c. If the Ordering Activity receives two (2) or more quotes from the same CTA relationship in response to a RFQ, the Ordering Activity shall only accept the CTA member's quote that was submitted first.
6. The Ordering Activity should establish Firm-Fixed Priced orders to the maximum extent practicable. However, orders placed under BPAs may contain Firm-Fixed Price (FFP), Time and Material (T&M), and/or Cost Reimbursement CLINs. A Cost Reimbursement CLIN is only allowable for the .75% Industrial Funding Fees or when Travel or ODCs under FAR 51 Deviation are anticipated.
7. Ordering Contracting Officers (OCO) have the flexibility to determine fair and reasonable pricing tailored to the Requiring Activity's requirement dependent upon level of competition, risk, uncertainties, complexity, urgency, and contract type. The OCO has the authority and responsibility for the determination of price reasonableness for each individual Task Order requirement. The OCO shall verify at the Task Order level that the price being awarded has been verified against each contractor's Schedule and BPA award document to determine the rates quoted are accurate and the appropriate discount has been applied. Published CMSS BPA Labor Rates at the BPA level establish the maximum allowable rates for Task Order requirements and take precedence over any newly awarded or revised Schedule rate.

Services offered on this BPA are priced at hourly rates for individual labor categories. These labor rates have already been determined fair and reasonable as a condition of the BPA holder's award of the BPA. Therefore, Ordering Activities are not required to make a separate determination of fair and reasonable pricing as it pertains to the labor rate pricing. However, a price evaluation as required by FAR 8.405-2(d) for the "total price" must be made by the OCO. If performance extends beyond the year five (5) CMSS BPA Labor Rates, a separate fair and reasonable price determination for labor rates and total price is required for each year thereafter.

By placing an order against this BPA the Ordering Activity has concluded that the order represents the best value (as defined in FAR 2.101) and results in the lowest

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overall cost alternative (considering price, special features, administrative costs, etc.) to meet the Government's needs. Although the labor rates negotiated on the BPA have been determined fair and reasonable pricing, ordering activities should seek additional discounts beyond the stated discount terms established within each BPA before placing an order.

Additionally, Task Orders should only contain those labor categories contained within the BPA unless services under FAR 51 Deviation are anticipated, see Section 9 below. OCOs are responsible for considering the level of effort, mix of labor, and any Off-Schedule Items (if any) quoted to perform a specific task being ordered, and for determining that the total price is reasonable.

After award, Ordering Activities should provide timely notification to unsuccessful Quoters. If an unsuccessful Quoter requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award decision shall be provided.

8. Options may be included in Task Orders with a Period of Performance (PoP) of no more than one year each. Orders issued prior to but not completed before the BPA ends shall comply with the terms and conditions as established in the contractor's GSA Schedule contract. See Section 7 above for additional information.
9. Limitation on Off-Schedule Items or Services (sometimes referred to as "Other Direct Costs" (ODCs), Open Market Items, Incidental Items, Non-Contract Items, and Non-Schedule Items): Off-Schedule Items are supply or commercial support services offered by the Contractor that are not already awarded and priced under the Quoter's FSS contract (or, in the event that the Quoter is utilizing a CTA, not awarded under a CTA member's FSS contract). Off-Schedule items are ancillary in nature and integrally related to the contractor's ability to perform the service being acquired. It includes categories of charges for commercial items or services utilized in direct support of performance of the services in the Task Order. The cumulative total lifetime value (for the base year and all option years) of any and all Off-Schedule Items a Quoter is quoting on a Task Order shall not exceed or be expected to exceed the micro-purchase threshold (FAR 2.101)). If a Quoter quotes Off-Schedule Items or Services in excess of the micro-purchase threshold then that Quoter's quote shall fail to meet terms of the BPA and Task Order RFQ and be rated technically unacceptable. The CMSS BPA vendor's quote must expressly itemize and identify any and all Off-Schedule Items or Services which the Quoter is including in the quote. Also, the Contractor shall maintain files in such a manner that the OCO may review them upon request to ensure price reasonableness compliance for those Off-Schedule Items or Services if any.
10. The CMSS BPA Labor Categories, identified in the award documents of each BPA, are considered bona fide executive, administrative, and professional labor that is exempt

Category Management Support Services (CMSS) Multiple Award BPA
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from the Service Contract Act (SCA). To the extent that any ancillary labor for services are within the scope of CMSS BPA SOW and subject to the SCA in accordance with FAR Subpart 22.10 and other applicable agency specific regulatory supplements, the OCO shall identify such work in the Task Order quote and make a determination as to whether SCA wage determinations are to be applied or not.

11. The OCO for each Task Order shall designate a Contracting Officer Representative (COR) to perform specific administrative or technical functions. The specific rights and responsibilities of the COR for each Task Order shall be described in writing and provided to the Contractor. A COR has no actual, apparent, or implied authority to bind the Government, that responsibility resides solely with the OCO.
12. The Ordering Activity may include agency specific regulations/terms and conditions in the Task Order that do not conflict with the GSA FSS contract or SOW Attachment 2 - BPA Terms and Conditions.
13. The Ordering Activity may utilize the FAR 51 deviation as detailed in SOW Attachment 4 - FAR 51 Deviation Ordering Guide and SOW Attachment 2 - BPA Terms and Conditions.
14. In accordance with FAR 17.502-2(b), the Economy Act does not apply to Task Orders awarded under the authority of 40 U.S.C. 501.
15. The Ordering Activity shall be responsible for administering and closing-out all resulting Task Orders.

Minimum Guarantee and Maximum Ceiling

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Federal Procurement Data System (FPDS) Recording Procedures

1. CTAs pose unique challenges to FPDS Recording Procedures. While all CTA members of a particular Team have privity to their BPA, only ONE FSS Contract number can be associated with ONE unique BPA number from a system perspective. Due to this system limitation, all CTA members have been assigned a unique BPA number. This does NOT mean each CTA member has a standalone BPA. Each member has its own unique BPA number for FPDS recording purposes only.
2. Regarding how **BPAs** themselves show in FPDS, the awarded Indefinite Delivery Vehicle (IDV) ID is the BPA number and the referenced IDV ID for that BPA number is the CTA member's FSS Contract number.

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3. Regarding how orders show in FPDS, an order will have its unique number as the Award ID with a referenced IDV ID number which will be a specific BPA number. Ensure that when you issue the Task Order in your purchase order system, you record the correct BPA number in FPDS as the IDV ID for the CTA member who is leading the Task Order.

R

FQ Summary

[▶ Forward RFQ](#)

Selected vendor(s) were notified

RFQ ID RFQ1058204 (Modification 1) (Modification 2) (Modification 3)	Reference # ID04150049				
RFQ Title Category Management Support Services (CMSS) Multiple-Award BPA					
RFQ Status Closed	Delivery Days From Date of Award to Date of Completion				
RFQ Issue Date 01/08/2016 12:17:54 PM EST	RFQ Close Date 01/28/2016 02:00:00 PM EST				
Line Items					
Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Description GSA/FAS is requesting quotes for the Category Management Support Services (CMSS) Multiple-Award Blanket Purchase Agreement from Small Businesses on the Professional Services Schedule (PSS) 00CORP, SINs 874-1, 874-4, and 874-5. For quote submission, SIN 874-1 is mandatory and SINs 874-4 and 874-5 are optional. Please review all the attached documents in their entirety prior to submitting a quote.					
Attached Documents: SOW BPA_ID04150049_Final.docx SOW TO Template_SOW Attachment 3_ID04150049_Final.doc FAR 51 Deviation Ordering Guide_SOW Attachment 4_ID04150049.docx BPA Ordering Guide_SOW Attachment 1_ID04150049_V2.doc Terms and Conditions_SOW Attachment 2_ID04150049_V2.doc QandA Template_ITQ Attachment 3_ID04150049.docx ITQ_ID04150049_V2.docx Consolidated QandA_20Jan16.docx Factor 1 Format_ITQ Attachment 1_ID04150049_V2.docx Pricing Matrix_ITQ Attachment 2_ID04150049_V3.xlsx					
Shipping Address					

(1) Multiple Locations:

General Services Administration
MULTIPLE CONUS LOCATIONS
Washington, DC 20405

Individual Receiving Shipment
DUSTIN TEAL
256-698-6316
DUSTIN.TEAL@GSA.GOV

Category Management Support Services (CMSS) Multiple Award BPA
Factor 1 Format - Demonstrated Technical Capabilities w/Experience
ITQ Attachment 1

SOW Section	Demonstrated Technical Capability with Experience Example	Identifying Data
3.0	Project Management Support: <i>Example should address at a minimum the Prime, Subcontractor or CTA member's company name, direct level of effort and involvement on the project and attributed performance results (capabilities demonstrated, key deliverables, outcomes, successes, improvements, etc.).</i>	-Contract/Order Number: -Dollar Value of Contract /Order: -Period of Performance: -POC's Name, Email, and Phone Number:
3.1.1	Spend Analysis:	
3.1.2	Agency Analysis:	
3.1.3	Market Analysis:	
3.1.4	Risk Analysis:	
3.1.5	Category Strategy Development:	
3.2.1	Total Cost Management:	
3.2.2	Demand Management:	
3.2.3	Supplier Management:	
3.2.4	Strategic Sourcing:	
3.2.5	Content Development/Management:	
3.2.6	Hallway Adoption Support:	
3.2.7	Technical Writing:	
3.3.1	Benchmarking:	
3.3.2	Performance Tracking:	
3.4.1	Data Management and Analytical Support:	
3.5.1	Category Expertise Support:	
3.6.1	Supplemental Change Management Support:	
3.7.1	Supplemental Communications Support:	
4.1.1	Strategic Direction and Vision:	
4.1.2	Training:	
4.1.3	Spend Under Management:	
4.1.4	Support Spend Analysis:	
4.2.1	Category Management Expertise Support:	
4.3.1	Support Ad Hoc Analyses:	
4.4.1	Overarching Change Management Support:	
4.5.1	Overarching Communications Strategy and Support:	
4.61	PMO Benchmarking:	

Category Management Support Services (CMSS) Multiple Award BPA
Factor 1 Format - Demonstrated Technical Capabilities w/Experience
ITQ Attachment 1



Category Management Support Services
(CMSS) Multiple Award BPA
FAR 51 Deviation Ordering
Guide
SOW Attachment 4

Federal Acquisition Regulation (FAR) Part 51 Deviation Ordering Guide

1.0 Introduction

1.1 Purpose

Federal Acquisition Regulation (FAR) 51.1, Contractor Use of Government Supply Sources, prescribes policies and procedures under which contractors may use government supply sources. Currently, Contracting Officers may authorize contractors to use General Services Administration (GSA) sources of supply in the performance of cost-reimbursement task order and under other limited scenarios when determined to be in the best interest of the Government.

In order to better meet the needs of GSA's customer agencies, a deviation to FAR Part 51.1 has been approved to expand the authority of contractors to use GSA sources of supply. Specifically, Contracting Officers have been authorized to give GSA contractors access to the Federal Supply Schedule (FSS) and GSA Global Supply Programs when deemed appropriate for fulfillment of their agency requirements. This authority is limited to orders:

- Placed on a time-and-materials (T&M)/labor-hour (LH) basis—an order placed by the Ordering Activity to the buying contractor can be partially fixed price, but the portion of the order for the items to be procured using the FAR 51 deviation must be T&M/LH;
- For ancillary supplies/services that are in support of the overall order such that the items are not the primary purpose of the work ordered, but are an integral part of the total solution offered;
- Issued in accordance with the procedures in FAR 8.405-1, Ordering Procedures for supplies, and services not requiring a statement of work;

1.2 Benefits

The ability for GSA contractors to purchase from the FSS and Global Supply Programs benefits our customers and contractor community.

- Allows GSA contractors to provide a total contract solution to meet customers' needs.
- Expands upon existing benefits of GSA vehicles, such as streamlining of procurements, ease of ordering, leveraged pricing, time savings, and responsible contractors.
- Meets customer needs expeditiously because the ancillary supplies and services are readily available from the FSS Program or Global Supply Program.
- Reduces agency procurement and contract administration costs.
- Provides agencies opportunities to increase utilization of small businesses.
- Reduces the necessity for government furnished equipment (GFE), which is labor intensive to properly administer.
- Simplifies market research.
- Encourages competition among contractors to seek the best solution, resulting in cost savings to the Government.
- Enables use of supply funds by contractors, which is the preferred payment method for some agencies.

1.3 Definitions

- **Buying Contractor:** The contractor who receives the primary order from the Ordering Activity and subsequently acts as the Ordering Activity's agent when placing an order to the selling contractor.
- **Selling Contractor:** The contractor who receives the secondary order placed under the FAR Part 51 authority from the buying contractor.
- **Authorization:** Written approval from the Ordering Activity for the contractor to use a Government supply source.
- **Time and Materials:** A time-and-materials task order provides for acquiring supplies or services on the basis of— direct labor hours at specified fixed hourly rates that include wages, overhead, general and administrative expenses, and profit; and actual cost for materials (FAR16.601(b)).
- **Labor Hour:** A labor-hour task order is a variation of the time-and-materials task orders, differing only in that materials are not supplied by the contractor (FAR 16.602).

2.0 Criteria for Use

When utilizing the authority granted under the FAR Part 51 deviation, all of the following criteria need to be met.

2.1 Primary Orders Are Issued on a Time-and-Materials (T&M)/Labor- Hour (LH) Basis

All or part of a primary order (order issued from the Ordering Activity to the buying contractor) must be on a T&M/LH basis. A portion of the primary order may be fixed price, but the items to be purchased under the FAR Part 51 authority must be structured on a T&M/LH basis. T&M/LH task orders are utilized when it is not possible at the time of award to estimate accurately the extent or duration of the work or to confidently anticipate the costs. Prior to awarding an order with a "not to exceed ceiling price", the Ordering Activity verifies that the ceiling price for support items and services purchased is reasonable.

When GSA contractors place orders with MAS and Global Supply contractors under the FAR 51 authority, the buying contractor who is purchasing the items must not add a fee or markup to the items. Additional fees/surcharges/markups are NOT permitted. Items must be invoiced at the price for which they were procured from the selling contractor.

2.2 Orders Are Limited to FAR 8.405-1, Ordering Procedures for Supplies, and Services Not Requiring a Statement of Work

Buying contractors must follow the procedures outlined in FAR 8.405-1. The procedures are used when ordering supplies and services that are listed in the Schedule contract at a fixed price for the performance of a specific task, where a statement of work is not required (e.g., installation, maintenance, and repair).

Purchases made on behalf of the Ordering Activity under the FAR 51 Part authority should not be issued to a contractor's own firm(s), subsidiary(s), subcontractors or teaming partners in order to maximize competition.

2.3 Supplies and/or Services are Ancillary to the Primary Purpose of the Order

Supplies and/or services procured under the FAR 51 authority must be ancillary in nature. The supplies and services shall not be the primary purpose of the work ordered, but an integral part of the total solution that is offered. Please note that there are different and additional requirements associated with Special Item Numbers (SINs) on numerous Schedules that contain Ancillary Repair and Alternations (R&A).

2.4 Use of Deviation is Not Available to State and Local Governments

The authority does not extend to state and local ordering activities and is intended for use only by GSA Contracting Officers.

3.0 Responsibilities

3.1 Ordering Activity

The Ordering Activity Must:

- Use the FAR 51 deviation appropriately and in accordance with applicable FAR Parts, including FAR Part 51 and the guidance contained in this ordering guide.
- Include Clause 52.251-1 Government Supply Sources, in applicable Request for Quotes (RFQs). The RFQ should also specifically state that items may be proposed on a T&M/LH basis using the FAR Part 51 authority. However, GSA may not mandate that the quote/proposal include items under FAR 51.
- Issue a written authorization to the buying contractor in accordance with FAR Subpart 51.102. An authorization template, that contains additional information specific to the FAR Part 51 deviation, is provided in Section 6.0.
- Ensure that the buying contractor is in compliance with the written authorization and has followed the ordering procedures in FAR 8.405-1 to promote competition. Compliance with FAR 8.405-1 can be verified by requesting from the buying contractor evidence that competition has been conducted, e.g. RFQ, quotes received, etc.
- Include the supplies and services ordered by the buying contractor in the dollar amount reported to Federal Procurement Data System (FPDS-NG) in accordance with FAR 4.606. Orders from GSA stock and the GSA Global Supply Program do not need to be reported in FPDS-NG.
- Assign the AAC or DODAAC if the contractor will be using the GSA Global Supply Program.

3.2 Buying Contractor

Contractors Placing Orders Must:

- Identify and separate those ancillary supplies/services that are proposed to be purchased under the FAR Part 51 authority on the quote submitted to the Ordering Activity and on the subsequent invoice.
- Purchase supplies and/or services at the Schedule contract price (or lower) with no fee/surcharge/markup. If supplies and/or services are provided by the selling contractor at lower than the contract price, the buying contractor must pass on the savings by invoicing the Ordering Activity accordingly.
- Ensure that the products and/or services procured under FAR 51 procedures are ancillary to the overall project/order.
- Provide a copy of the written authorization from the Ordering Activity with each applicable order to the selling contractor.
- Ensure that the buying contractor's Schedule contract number is on each order issued to the selling contractor.
- Remit full payment to the selling contractor.
- Submit documentation of the transmittal of full payment to the selling contractor when invoicing Ordering Activity.
- Follow any applicable FSS or GSA Global Supply Program ordering procedures in addition to procedures outlined in FAR 8.405-1 and FAR Part 51. For more information on placing orders with GSA Global Supply, please visit www.gsaglobalsupply.gsa.gov.

3.3 Selling Contractor

Schedule Contractors Accepting Orders Must:

- Have the ability to accept or reject orders from the buying contractor.
- Ensure that a copy of the written authorization from the Ordering Activity is included in the order issued by the buying contractor.
- Ensure that the buying contractor's contract number is shown on each order.
- Sell to the buying contractor at the MAS contract price or lower pursuant to FAR 8.4.
- Understand that a purchase made under the authority of FAR Part 51 does not trigger a price reduction under GSAM clause 552.238-75, Price Reductions.
- Include on each invoice the language, "in care of '[name of Ordering Activity]' under written authorization from _____ dated _____".
- Assume the financial risk and other risks of selling directly to another contractor. Any dispute involving the distribution of payment between the buying and selling contractor will be resolved without any involvement by the Ordering Activity. Since each contractor has a Schedule or Global Supply contract, each contractor is held accountable under the terms and conditions of its contract for any problems, such as warranty or performance issues.
- Track and report sales as Schedules contract sales, and remit the Industrial Funding Fee (IFF) accordingly.

3.4 Global Supply

GSA Global Supply will:

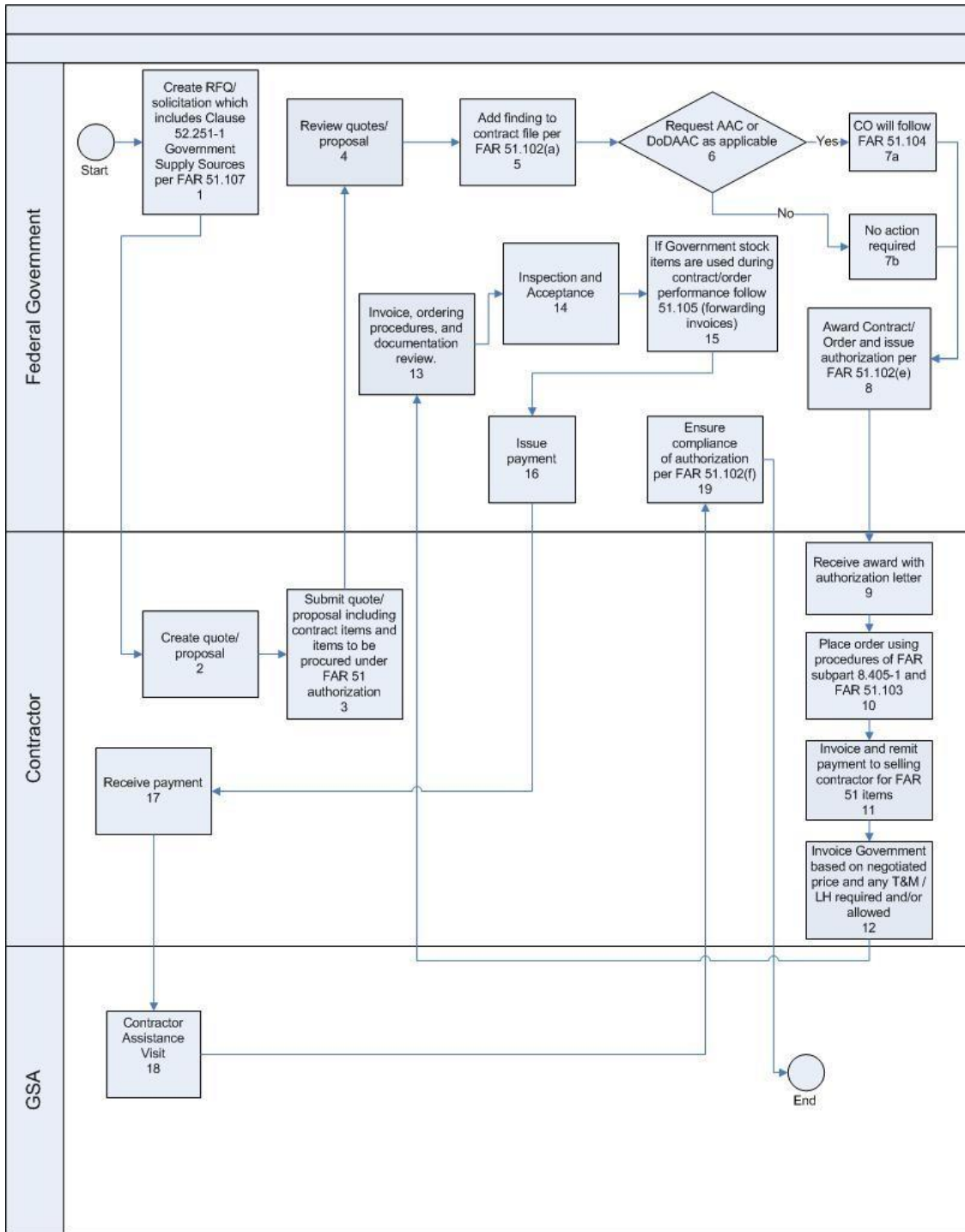
- Accept all orders from buying contractors, provided the contractor provides evidence that he has the proper authorization and an Activity Address Code (AAC) or Department of Defense Activity Address Code (DODAAC).
- Charge the standard price.
- Follow normal requisition processes using assigned AAC or DODAAC.

4.0 Process

The process map below outlines the general ordering process and each stakeholder's responsibilities for use of the FAR Part 51 deviation. The process steps are numbered in sequential order, and the following section (4.2) elaborates on each of the steps.

For more information on placing orders with the FSS Program, please visit www.gsa.gov/schedules-ordering.
For more information on placing orders with GSA Global Supply, please visit www.gsaglobalsupply.gsa.gov.

4.1 Process Map



4.2 Explanation of Process Steps

4.2.1. The Ordering Activity - Include Clause 52.251-1

Include Clause 52.251-1, Government Supply Sources, in all Request for Quotes (RFQ) to indicate to prospective offerors that items to be procured under the FAR Part 51 deviation may be proposed as part of the quote/proposal. The RFQ should also specifically state that the items will be awarded on a T&M/LH basis. The Ordering Activity should not mandate that the quote/proposal include items under FAR Part 51.

4.2.2 Buying Contractor - Create quote(s)

The buying contractor is responsible for preparing a quote/proposal in accordance with the RFQ requirements. The contractor does not have to utilize FAR Part 51; however, if he chooses to do so, all ancillary items to be purchased pursuant to the FAR Part 51 authority will be proposed on a T&M/LH basis with an established ceiling price. Items proposed to be purchased under FAR 51 should be clearly labeled as such and separated from proposed, fixed price Schedule items.

4.2.3 Buying Contractor - Submit quote(s)

The contractor submits the prepared quote(s)/proposal to the Ordering Activity.

4.2.4 The Ordering Activity - Review quote(s)

The Ordering Activity reviews the submitted quotes/proposals in accordance with the RFQ and FAR Subpart 8.4.

- T&M/LH – When reviewing a T&M/LH pricing structure where a not to exceed or estimate is used for all proposed items, including ancillary items and services, the Contracting Officer will verify that the estimated price/ceiling price is reasonable given the proposed labor mix, level of effort, type of other direct costs included, etc.
- Combination of Fixed Price and T&M/LH - The Contracting Officer will review the proposed items under the contractor's schedule contract as a fixed price and will verify that the estimated ceiling price for support items and services to be purchased pursuant to the FAR Part 51 authority on a T&M/LH basis is reasonable.

4.2.5 The Ordering Activity - Add written finding supporting the issuance of the authorization to the task order file per FAR 51.102(a)

The Ordering Activity will place a written finding in the task order file that supports issuance of the authorization to the buying contractor to use Government supply sources in accordance with FAR 51.102(a).

4.2.6 The Ordering Activity - Request AAC or DODAAC as applicable

This step is applicable for orders being placed with GSA Global Supply. An AAC is a code that identifies an activity that has authority to requisition or receive material. The DODAAC serves a similar purpose for DOD activities. In accordance with FAR 51.104, the Ordering Activity will request an AAC/DODAAC with a time limited access code for the contractor, as applicable, so that the contractor may requisition for the task order.

4.2.7 Is an AAC or DODAAC required?

a) Yes

Follow FAR 51.104 Furnishing Assistance to Contractors, which describes how the Ordering Activity should go about helping the contractor with the AAC and the associated ordering information and instructions - FEDSTRIP or MILSTRIP and forms

b) No

No action is needed.

4.2.8 Ordering Activity - Award task order and issue authorization per FAR 51.102(e)

The authorization must include all of the applicable elements listed in FAR 51.102(e). A suggested template is attached in Section 6.0. Please note that the Ordering Activity may include any other limitations or conditions in the authorization when necessary, e.g. dollar value thresholds (FAR Part 51.102(e)(4)).

4.2.9 Buying Contractor - Receive award with written authorization

When the contractor receives the task order award, it will include a copy of the written authorization.

4.2.10 Buying Contractor - Place order using proper procurement procedures

The buying contractor must comply with FAR 8.405-1 when purchasing from the Federal Supply Schedules and follow the normal requisition process when purchasing from the Global Supply Program. In addition to the procedures outlined in FAR 51.103, the contractor should also follow the best practices outlined in this ordering guide. The buying contractor must provide a copy of the authorization provided by the Ordering Activity to the selling contractor.

4.2.11 Buying Contractor - Invoice and remit payment to selling contractor for items procured under the FAR 51 authority

The buying contractor must remit full payment to the selling contractor prior to invoicing the Ordering Activity.

4.2.12 Buying Contractor - Invoice the Government

The buying contractor submits an invoice reflective of the pricing agreement. The contractor passes through the purchase price of items procured under FAR Part 51 with no fee or markup. Items purchased under the FAR Part 51 authority should be identified and separated from the rest of the items on the invoice. The buying contractor should provide appropriate documentation that the selling contractor has been paid in full.

4.2.13 Ordering Activity - Invoice, ordering procedures and documentation review

The Ordering Activity reviews the invoice prior to approving payment. In a T&M/LH order, the Ordering Activity is paying the contractor at the schedule price paid by the contractor (minus any discount) for individually line itemed labor-hours and materials. It is the Ordering Activity's responsibility to ensure that the contractor has complied with all stipulations in the written authorization. The Ordering Activity should request additional documentation to support that the contractor followed the appropriate procurement procedures.

4.2.14 Ordering Activity - Inspection and Acceptance

The Ordering Activity inspects and accepts the products and/or services.

4.2.15 Ordering Activity - If Government stock items are used during task order performance follow FAR 51.105 (forwarding invoices)

FAR 51.105 states that GSA, DOD and VA will wait to forward a bill for supplies from Government Stock to a contractor until the supplies have been shipped.

4.2.16 Ordering Activity - Issue payment

The Ordering Activity will authorize and issue payment.

4.2.17 Contractor - Receive payment

The contractor who placed the order receives payment from the Ordering Activity.

4.2.18 GSA - Contractor Assistance Visit (CAV)

The Industrial Operations Analyst (IOA) conducts Contractor Assistance Visits (CAVs) periodically throughout the task order term.

4.2.19 GSA – CAV Review

The Industrial Operations Analyst (IOA) generally conducts Contractor Assistance Visits (CAVs) at mid- term and end of the task order term. The CAV is a review of the contractor's processes to meet Federal Supply Schedule task order requirements.

CAV Question (new in late 2010) – Was an order(s) placed by a GSA contractor for a Government Ordering Activity and fulfilled by a Federal Supply Schedule contractor?

a) No

No review is needed.

b) Yes

Starting in late 2010 and as part of the routine CAV, the IOA will also verify that a written authorization(s) is in place for applicable sales. The IOA will report accordingly to the GSA Contracting Officer for the Schedule contract.

4.2.20 Ordering Activity - Ensures that authorization and ordering procedures are followed properly

The Ordering Activity Contracting Officer who grants the authorization is responsible for ensuring that the contractor has complied with the written authorization and all applicable regulations.

5.0 Questions and Answers

Question: Can the Ordering Activity Contracting Officer tailor the written authorization?

Answer: Yes. FAR Part 51.102(4) permits the authorization to be tailored. The Contracting Officer may limit the scope and purchasing authority by customizing the authorization to limit the scope to specific supplies or services, specific schedules, dollar thresholds, socioeconomic requirements, etc.

Question: Does the selling contractor have to accept an order placed by the buying contractor?

Answer: No. Accepting an order from a buying contractor is optional.

Question: When the buying contractor is procuring Schedule items from another Schedule contractor, does the buying contractor have to report the sales to GSA and pay the IFF?

Answer: No. The selling contractor is responsible for reporting sales and remitting the IFF.

Contractors placing orders do not report sales and remit IFF on items procured under FAR Part 51. When acting under the authority granted by the FAR 51 deviation, the buying contractor is an authorized user of GSA's FSS and Global Supply Programs. The products/services procured under this authority are not considered to be MAS sales because these items are not on the buying contractor's Schedule contract and are therefore not subject to sales reporting and IFF remittance. To ensure that the sales are segregated appropriately, adjustments to the buying contractor's sales tracking system may be necessary.

Question: So even though the selling contractor is selling their Schedule items to another Schedule contractor, the sales are still considered to be Schedule sales?

Answer: Yes. Contractors accepting orders report sales and remit IFF on items procured under FAR Part 51. When accepting orders from the buying contractor with a valid authorization, selling contractors are making MAS contract sales to an authorized user of the FSS Program pursuant to the FAR 51 deviation. As such, the products/services procured under the authority are considered to be MAS contract sales. All contract requirements for sales reporting and IFF remittance apply. To ensure that the sales are segregated appropriately, adjustments to the selling contractor's sales tracking system may be necessary.

Question: Does the Price Reduction clause apply to FAR Part 51 sales?

Answer: No. In the normal course of business, FSS contractors are contractually obligated to notify the GSA Contracting Officer of price reductions in accordance with GSAM clause 552.238-75 Price Reductions. However, GSA contractors purchasing from the FSS Program and/or Global Supply Program in accordance with FAR 51.101 are authorized users; therefore, pursuant to GSAM clause 552.238-75(d)(2) Price Reductions, there is no price reduction for sales to eligible ordering activities under a Schedule contract.

Question: Can the Ordering Activity modify an existing order to incorporate the FAR 51 authority?

Answer: No. The authorization needs to be issued with the original order.

Question: Can the Ordering Activity modify an existing Blanket Purchase Agreement (BPA) to incorporate the FAR 51 authority?

Answer: No.

Question: Can the buying contractor add any additional markup/fee onto the items procured under the FAR 51 authority, even if the fee is associated with a legitimate cost like a material handling charge?

Answer: No. The items procured under the authority must be passed through to the Ordering Activity at the MAS contract price less any applicable discount. No markup of any kind is permitted on this portion of the order.

Question: Can the buying contractor use GSA e-Buy to satisfy the requirements of FAR 8.405-1?

Answer: Not yet. GSA intends to make the necessary modifications to e-Buy to permit use by contractors in the near future. It's also possible that GSA will mandate e-Buy or other electronic tools; however, at the moment, these tools are not available for contractor use.

Question: If the buying contractor chooses not to use the FAR 51 authority, what other options are available to satisfy the Ordering Activity's overall requirement?

Answer: There are other options available. Refer to www.gsa.gov for more information. For example, if permitted by the order, contractors may use contractor team arrangements (www.gsa.gov/cta), subcontracts, and open market items in accordance with FAR 8.402(f).

6.0 Authorization Template

A. This FAR 51 deviation authorization is for orders:

- Placed on a time-and-materials (T&M) basis;
- For supplies/services that are ancillary or in support of the overall order;
- Issued in accordance with the procedures in FAR 8.405-1, Ordering Procedures for supplies, and services not requiring a statement of work;
- For new task orders. Authorizations under the FAR 51 authority cannot be issued on existing task orders; and
- Placed by the Ordering Activity. The authorization is not available to state and local governments.

This authorization is limited to the following dates: The period from _____ to _____.

This authorization is limited to the following specific dollar amount: _____ per period

_____. This authorization is

limited to the following Federal Supply Schedule(s): All _____

Limited to only the following Schedule(s):

This authorization is limited to the following Global Supply Program product(s): All _____ Limited to only the following prod

The property acquired under this authority will:

Automatically vest in title to: Government _____ Contractor _____

Additional limitations or conditions for use of this authority:

B. As a user of this authority under the Federal Supply Schedule Contracts, you must comply with the following:

- Follow any applicable FSS ordering procedures in addition to procedures outlined in FAR 8.405-1. FAR 51, agency supplements, any other applicable statutes and regulations;
- In the event of any inconsistency between the terms and conditions of this order and those of your

Federal Supply Schedule contract, the terms and conditions of your Federal Supply Schedule contract will govern;

- Pass through supplies and/or services at the Schedule contract price (or lower) with no fee/surcharge/markup. If supplies and/or services are provided by the selling contractor at lower than the contract price, the savings must be passed on to the government by charging the ordering activity accordingly;
- Ensure that the products and/or services procured under FAR 51 procedures are ancillary to the overall project/order;
- Provide a copy of the written authorization from the ordering activity with each applicable order;
- Ensure that the Schedule contract number is on each order;
- Remit full payment to the selling contractor prior to invoicing the ordering activity;
- Not issue any orders under the FAR 51 authority to my own firm(s), subsidiary(s), subcontractors or teaming partners; and
- Ensure that the selling contractor includes on each invoice, "in care of '[name of government agency]'" under written authorization from _____ dated _____".

C. As a user of this authority under the GSA Global Supply Program, you must comply with the following:

- Follow any applicable GSA Global Supply Program ordering procedures;
- Ensure that the products and/or services procured under FAR 51 procedures are ancillary to the overall project/order;
- Provide a copy of the written authorization from the ordering activity with each applicable order;
- Ensure that the Global Supply number is on each order; and
- Not issue any orders under the FAR 51 authority to my own firm(s), subsidiary(s), subcontractors or teaming partners.

Contractors placing orders for Government Supply shall—

(1) Comply with the requirements of the Contracting Officer's authorization, using FEDSTRIP or MILSTRIP procedures, as appropriate;

(2) Use only the Government activity address code obtained by the Contracting Officer in accordance with [51.102\(e\)](#) along with the contractor's assigned time limited access code, when ordering from GSA Customer Supply Centers. Time limited access codes should be reviewed at periodic intervals and extended/cancelled based on the Government's need; and

(3) Order only those items required in the performance of their task order(s).

The contractor is hereby authorized to use the following supply source(s):

The GSA Supply Program (Requisitioning with FEDSTRIP or MILSTRIP): Yes / No

Note: When requisitioning from GSA or DoD, the contractor shall use FEDSTRIP or MILSTRIP, as appropriate, and include the activity address code assigned by GSA or DoD. This authority should be time limited with automated pass code expiration and accounts monitored. When requisitioning from the VA, the contractor should use FEDSTRIP or MILSTRIP, as appropriate, Optional Form 347, Order for Supplies or Services (see 53.302-347), or an agency-approved form. When placing orders for helium with the Bureau of Land Management, the contractor shall reference the Federal contract number on the purchase order;

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Task Order - Statement of Work Template
SOW Attachment 3

**General Services Administration (GSA)
Federal Acquisition Service (FAS)**

STATEMENT OF WORK

Request for Quote:

Task Order Title:

RFQ Issue Date:

1.0 Introduction: Work is to be accomplished for the (***Requesting organization and location***), herein referred to as Requesting Activity, through the General Services Administration (GSA) / Federal Acquisition Service (FAS) / (***Ordering Agency and Location***).

1.1 Points of Contact:

GSA Customer Account Manager (CAM)/Contract Specialist

Name:

Address:

City, State, Zip:

Phone:

FAX:

E-mail

GSA Ordering Contracting Officer (OCO)

Name:

Address:

City, State, Zip:

Phone:

FAX:

E-mail:

Information provided in "Red" is for Ordering Activity consideration only and should be removed prior to the RFQ. If sections are not applicable to the Task Order requirement, insert "Not Applicable to this Task Order".

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- 1.2 Background:** *List background information that will aid a Quoter in understanding the nature and origin of the project. Include a brief summary of any previous or current projects related to the effort. If applicable, discuss any known difficulties or constraints. The discussion should provide sufficient information to enable a prospective Quoter to understand how the requirement arose and how it fits into a broader series of events.*

Provide a short description of the requirements without including specific requirements. How did the requirement evolve? Why is the work needed? Include summary of information essential for understanding the work. Is this a new task? How was it procured previously? Is the requirement related to other task orders?

If applicable, include the following statement: This task may be incrementally funded.

- 1.3 Objective:** *Furnish a succinct statement of the overall purpose of the project and the specific objectives. What are Requesting Activity's expectations and goals? What is the desired end result?*

- 1.4 Task Order Type:** *Firm-Fixed-Price (FFP) Time and Material (T&M) Labor Hour.*

- 1.5 Period of Performance (PoP):** *Identify the PoP of this project using this example:*

If the task order will include options, identify the option periods. Also, include the following clauses for options that may extend the term of the task order.

FAR 52.217-8, Option to Extend Services. (Nov 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within thirty (30) calendar days of the end of the task order.

FAR 52.217-9, Option to Extend the Term of the Contract. (Mar 2000)

(a) The Government may extend the term of this contract by written notice to the Contractor within thirty (30) calendar days before the contract expires; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least sixty (60) calendar days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

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(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed _____ years.

The following clause is incorporated by reference.

FAR 52.217-5, Evaluation of Options (Jul 1990)

2.0 Scope: *The scope should provide a brief statement or overview describing what the task will accomplish and what it includes. This statement should describe the task in broad terms or categories, not in specific work tasks or deliverable products. The general scope shall be fit within the CMSS BPA scope.*

3.0.1 Performance Requirements: *Performance requirements are statements describing the required services in terms of output; see BPA SOW tasks and format to tailor task order level tasks.*

- Tell the contractor the outcome you want. List specific tasks with emphasis on the use of specified deliverables.*
- Describe the work in terms of “what” the output must be. Express the outputs in clear, concise, commonly used, easily understood, measurable terms. Requirements should not include detailed procedures that dictate how the work is to be accomplished.*
- (Enter specific software packages and programs that will be used to perform requirements.)*

-Through-

4.6.1 Performance Requirements: *Performance requirements are statements describing the required services in terms of output; see BPA SOW tasks and format to tailor task order level tasks.*

- Tell the contractor the outcome you want. List specific tasks with emphasis on the use of specified deliverables.*
- Describe the work in terms of “what” the output must be. Express the outputs in clear, concise, commonly used, easily understood, measurable terms. Requirements should not include detailed procedures that dictate how the work is to be accomplished.*
- (Enter specific software packages and programs that will be used to perform requirements.)*

5.0 Performance Criteria Matrix:

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Identify performance criteria that is significantly important to the accomplishment of the task and that can be measured against performance standards. Only choose the highest level criteria that will allow you to measure the desired performance.

Deliverable or Required Services (1)	Performance Standard(s) (2)	Acceptable Quality Level (AQL) (3)	Method of Surveillance (4)

- 6.0 Contract Performance Evaluation:** In accordance with FAR 8.406-7, Contractor Performance Evaluation and FAR 42.15, the Government will provide and record Past Performance Information for acquisitions over \$150,000 utilizing the Contractor Performance Assessment Reporting System (CPARS). The CPARS process allows contractors to view and comment on the Government's evaluation of the contractor's performance before it is finalized. Once the contractor's past performance evaluation is finalized in CPARS it will be transmitted into the Past Performance Information Retrieval System (PPIRS).

Contractor's are required to register in the CPARS, so contractor's may review and comment on past performance reports submitted through the CPARS.

CPARS www.cpars.gov

PPIRS www.ppirs.gov

- 7.0 Task Order Deliverables:** All deliverables shall be delivered to the Contracting Officer's Representative (COR) no later than the specified dates stated in the Performance Matrix in Section 5.0.

(Identify in Section 5.0 any special instructions that are applicable to the deliverables.)

- 7.1 Kick-Off Meeting:** *If applicable, identify Kick-Off Meeting details and requirements such as task award date, contractor will meet with (insert COR and/or Requesting Activity's name) to review goals and objectives of this task order, and to discuss technical requirements and deliverables.*

- 8.0 Records/Data:** *If applicable, indicate data normally generated in the performance of this task and ownership of the data at the end of the task and insert clause FAR 52.227-14, Rights in Data-General (May 2014). In addition, identify the format and rights of the data.*

Example: All data and data rights associated with this effort will be property of _____.

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- 9.0 Inspection and Acceptance:** Inspection and acceptance will occur in accordance with **(Choose between FAR 52-246-4, Inspection of Services - Fixed Price; or FAR 52-246-6, Inspection of Services – Time and Material and Labor Hour).** ***Identify COR and/or CO's inspection period after deliverable submission / performance.***

Unsatisfactory work - Performance by the contractor to correct defects found by the Government shall be at the contractor's own expense and without additional reimbursement by the Government. Unless otherwise negotiated by the Ordering Activity's CO, the contractor shall correct or replace all non-conforming services and deliverables no later than 10 workdays after notification of non-conformance.

- 9.1 Quality Control:** ***If applicable, identify the Quality Control Plan's deliverable and acceptance period and procedures.***
- 9.2 Quality Assurance:** The Government will evaluate the contractor's performance of this task order. For those tasks listed in the Performance Matrix, the COR or other designated evaluator will follow the method of surveillance specified in this task order. Government personnel will record all surveillance observations. When an observation indicates defective performance, the COR or other designated evaluator will require the contractor manager or representative at the site to initial the observation. Government surveillance of tasks not listed in the Performance Matrix or by methods other than those listed in the Performance Matrix (such as provided in the Inspection clause) may occur during the performance period of this task order. Such surveillance will be done according to standard inspection procedures or other task order provisions. ***If applicable, list Quality Assurance Surveillance Plan (QASP) attachment and any other relevant quality assurance information.***
- 10.0 Task Order Terms and Conditions:**
- 10.1 Place of Performance:** ***List on-site (Gov't) or off-site (contractor facility) and state any/all locations that the contractor may be asked to perform this requirement.***
- 10.2 Hours of Operation:** ***Identify normal working hours and days and all holidays performance will not be required. If performance location is off-site, identify hours that the Contractor will be required to be available.***
- 10.3 Task Management:** ***The Ordering Activity shall appoint a COR for management of this task. Identify where deliverable shall be submitted, COR designation and appointment procedures, and COR responsibilities.***
- 10.4 Task Order Key Personnel:** ***If applicable, identify if Task Order Key Personnel are required and list any required qualifications, experience, certifications, education, etc.***

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- 10.5 Government Furnished Items and Information:** *List any Government items, property or information that will be provided to the Contractor in relation to this task. (If none, so state).*

The SOW may also require the contractor to specifically identify in their quote the type, amount, and time frames required for any government resources.

- 10.6 Contractor Furnished Items:** Except for those items or services stated in section 10.5 as Government furnished, the contractor shall furnish everything needed to perform this contract according to all its terms.

(Unless there are specific items that are required and it is important to detail them, the general statement above is all that is required. If there are to be specific items listed, make sure the introduction to the listing states that the list is not all inclusive of the contractor-furnished items and services required to perform the task order.)

- 10.7 Support Items:** Support Items are categories of charges utilized by the contractor in the performance of the task order service. Support Items are ancillary in nature and integrally related to the contractor's ability to perform the service being acquired, i.e., they must be necessary for the completion of the task. Acquisition of Support Items can not be the primary purpose of a task order. The support item must satisfy the criteria expressed within the scope of the contract/task order. Support Items must not duplicate cost covered in other areas of the Task Order. Incidental- Open Market Items must be necessary and integral with the overall service being performed in the task order.

- 10.7.1 Schedule Support Items:** *Identify if Schedule Support Items are anticipated / authorized or are NOT anticipated / authorized.*

- 10.7.2 Open Market (Non-Schedule) Items:** *Identify if Open Market (Non-Schedule) Items are anticipated / authorized or are NOT anticipated / authorized. (For Labor Hour task orders use the following)* Since this task order is a Labor Hour type, no Open Market Items are anticipated or authorized under this task.

Or

(For FFP, Cost Reimbursement, and Time & Materials use the following) Open Market items are any item of labor category or material offered by the Contractor that is not awarded and priced under their GSA Schedule Contract or a Teaming Partner's Schedule Contract. Open Market Items shall be necessary and integral with the overall service being performed in the task order. All Open Market Items shall be itemized in the Quoter's quote. These items must be competed in accordance with

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FAR requirements and their cumulative total over the life of the task order (includes base period and all option years) shall not exceed the Micro-Purchase Threshold. The contractor shall submit Requests for Open Market Items for Government Approval. Requests for Open Market Items must first be reviewed and approved by the OCO.

The Contractor is strongly encouraged to have necessary Open Market Items added under their Schedule Contract as a SSI or to seek a Contractor Teaming Arrangement with another Schedule Contract instead of offering Open Market Items or labor categories not on the contractor's schedule.

10.7.3 Materials: *(For orders with Materials anticipated use the following)* The contractor may be required to obtain supplies, and/or materials in support of the task order requirements. This order will contain clause 52.251-1 that will allow the contractor to purchase materials directly from other GSA Schedule contractors. Terms and conditions associated with this process are included below in section 10.7.4, FAR 51 Deviation.

The Not-to-Exceed budget for materials shall not exceed the Micro-Purchase Threshold:

Example:

<i>Base Period</i>	<i>\$1,000.00</i>
<i>Option Period One</i>	<i>\$1,000.00</i>
<i>Option Period Two</i>	<i>\$1,000.00</i>
<i>Option Period Three</i>	<i>\$500.00</i>
<i>Option Period Four</i>	<i>\$0.00</i>

10.7.4 FAR 51 Deviation Purchase of Materials under 52.251-1:

If applicable, incorporate FAR Clause 52.251-1 here, and reference guidance and provisions regarding the FAR 51 Deviation can be found in SOW Attachment 4 – FAR 51 Deviation Ordering Guide.

10.8 Travel: ***Identify if Travel is required. If so list applicable Travel requirements (requests, approvals, and invoicing), Not-to-Exceed Travel budget, and Federal Travel Regulations reference.***

10.9 Privacy Act: ***Identify if contractor personnel will or will not have access to Privacy Information. If so insert: "Personnel shall adhere to the Privacy act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations."***

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- 10.10 Security:** *Specify if this project requires building access, Common Access Cards / Smart Cards, and/or security requirements / procedures.*
- 10.11 Task Order Monthly Status Report (MSR):** *Identify if a Task Order Level MSR is required and monthly due date. In addition, identify the Task Order MSR contents. For example:*
- *Brief description of requirements;*
 - *Brief summary of accomplishments during the reporting period and significant events regarding the task order;*
 - *Deliverables submitted or progress on deliverable products;*
 - *Any current or anticipated problems; and,*
 - *Brief summary of activity planned for the next reporting period.*
- (For Firm-Fixed-Price task orders add the following bullet)*
- *Travel, T&M, Labor Hour, or Cost Reimbursement charges and ceilings*
- 10.12 Task Order Funding:** *Identify if the task will be fully funded or incrementally funded. If incrementally funded insert FAR 52.232-18, Availability of Funds (Apr 1984) by reference. In addition, insert any funding restrictions, information, or guidance.*
- 10.13 Ceiling Price Notification:** *For orders with T&M, Labor Hour, and Cost Reimbursement CLINs only identify any funded ceiling notification requirements.*
- 10.14 Section 508 Compliance:** *If the task order includes the acquisition of any electronic or information technology, then the following statement should be included. In most professional services tasks this section is not applicable.*

The Industry Partner shall support the Government in its compliance with Section 508 throughout the development and implementation of the work to be performed. Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d) requires that when Federal agencies develop, procure, maintain, or use electronic information technology, Federal employees with disabilities have access to and use of information and data that is comparable to the access and use by Federal employees who do not have disabilities, unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Industry Partner should review the following Web sites for additional 508 information:

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<http://www.section508.gov/index.cfm?FuseAction=Content&ID=12>
<http://www.access-board.gov/508.htm>
<http://www.w3.org/WAI/Resources>

10.15 Organizational Conflicts of Interest (OCI): The guidelines and procedures of FAR 9.5 will be used in identifying and resolving any issues of OCI at the Task Order Level. Regarding OCI issues, orders may incorporate more specific terms and conditions including but not limited to restrictions, in the Government's discretion, corresponding to the particular requirements of each order. In the event that this Task Order requires activity that would create an actual or potential conflict of interest, the Contractor shall:

- a. Notify the OCO of the actual or potential conflict, and not commence work on any task requirement that involves a potential or actual conflict of interest until specifically notified by the OCO to proceed;
- b. Identify the conflict and recommend to the OCO an alternate tasking approach which would avoid the conflict;
- c. If the OCO determines that it is in the best interest of the Government to issue the Order, notwithstanding a conflict of interest, a request for waiver shall be submitted in accordance with FAR 9.503.

Identify if Organizational Conflicts of Interest Statements is required or not required.

10.16 Non-Disclosure Agreements: *Identify if Non-Disclosure Agreements are required or not required.*

11.0 Invoicing and Payment: *Specify where invoices shall be submitted to and the timeframe in which they are to be submitted. Include any other pertinent information such as Travel, Labor Hours, or ODCs, and invoice structure and revision process, etc.*

12.0 Task Order Closeout: The contractor shall submit a final invoice and a completed and signed Release of Claims (GSA Form 1142) to the OCO, within sixty (60) calendar days after the end of the Performance Period. After the final invoice has been paid, the contractor shall receive a unilateral modification for task order closeout.

13.0 Reference Information: *Identify any applicable references.*

14.1 Definitions & Acronyms: *Identify all terms that has meaning other than that contained in a dictionary and task-specific acronyms.*

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- 14.2 Applicable Documents:** *Provide a listing of all documents cited in the SOW including Government directives, formal specifications and standards, and other documents cited. Identify each by title, number, and the date of edition or revision.*
- 14.3 Attachments:** *Identify any attachments.*

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1.0 BPA Terms and Conditions

The Terms and Conditions stated below are in addition to and inclusive of the CMSS BPA Statement of Work (SOW).

2.0 Applicable Schedule/Special Item Numbers (SINs) under this Blanket Purchase Agreement (BPA)

The applicable GSA Schedule for CMSS Multiple Award BPA is The Professional Services (PSS) Schedule 00CORP, SINs:

874-1	Integrated Consulting Services
874-4	Training Services
874-5	Ancillary Supplies and/or Services

3.0 General

The Contractor shall comply with all terms and conditions of their awarded GSA 00CORP Schedule for the BPA and subsequent Task Orders. The terms and conditions in the BPAs apply to all orders placed pursuant to it. In the event of any conflict between the Schedule contract and the BPA, the terms and conditions of the Contractor's Schedule shall prevail over the BPA and Task Orders with the exception of CMSS Labor Rates. The CMSS Labor Rates established upon BPA award take precedence over any newly award or revised Schedule rates. Ordering activities may add non-conflicting terms and conditions to individual orders.

CMSS BPAs do not obligate funds. The Government is obligated only to the extent of authorized orders made under the BPAs. It is the responsibility of the individual Ordering Activities to ensure adequate funds are available. There is no limit on the dollar value of order purchases made under the CMSS BPAs. The maximum order limitation shown in 00CORP Schedule's FAR clause 52.216-19 does not limit the dollar value of an order. For a multiple award BPA, the maximum order limitation would have no practical effect as orders are competed. If a contractor does not wish to honor an order above the maximum order limitation threshold, they simply would not quote on that particular requirement's Request for Quote (RFQ).

4.0 Period of Performance (PoP)

4.1 BPA Period of Performance

The PoP for each BPA is five (5) years unless otherwise canceled in accordance with Section 5.0 below.

4.2 Task Order Period of Performance

Task Orders may only be issued against existing BPAs. Order will have their own PoP which may contain options. Orders issued prior to but not completed before the BPA ends shall comply with the terms and conditions as established in the contractor's GSA Schedule contract.

5.0 BPA Cancellation and Off-ramping

Either party (the Government, the Prime, or any Contractor Teaming Arrangements (CTA) member) may cancel this BPA at any time by providing written notice. The cancellation will take effect thirty (30) calendar days after the other party receives the notice of cancellation. BPA cancellation does not release the BPA contractor from the duty to continue Task Order performance on existing orders or complete BPA Level reporting requirements (BPA Terms and Conditions section 7.0). Ongoing orders continue in accordance with their own period of performance. Termination procedures for Task Orders are addressed in the underlying Schedule contract.

In the event a Small Business Prime CMSS BPA vendor (non-CTAs) becomes other than a Small Business Concern (SBC) during the BPA's Ordering Period, the vendor will be off-ramped in accordance with the cancellation procedures in Section 5.0 above. In the event a CTA member becomes other than a SBC during the BPA's Ordering Period, the applicable CTA member shall not respond to any CMSS RFQs, Requests for Information (RFIs), or perform more than 50% or as the Lead CTA member on any subsequent Task Order. Other examples of why the Government may unilaterally elect to off-ramp a BPA holder include but are not limited to the following:

- The GSA Schedule contract expires or the contractor fails to maintain BPA awarded labor categories on the Contractor's GSA Schedule.
- Debarment, Suspension, or Ineligibility as defined in FAR Subpart 9.4.
- Contractors who fail to consistently provide a response to task order Request for Quotes.
- Contractors who fail to complete task order objectives.

6.0 On-ramping Provision

The Government reserves the right to reopen this RFQ in order to establish additional BPAs if the GSA Contracting Officer determines it to be in the best interest of the Government to increase competition, support socio-economic goals, or to achieve other Government interests or requirements.

The reopening of the solicitation (on-ramping) will be achieved via a RFQ amendment to all PSS 00CORP Schedule holders through eBuy. It is the Government's intent to evaluate quotes received in response to the reissued/reopened BPA RFQ in accordance with the same or substantially the same evaluation factors in this original BPA RFQ; those evaluation factors and other instructions if any shall be detailed in the reissued/reopened RFQ. On-ramped Quoter's quote must be rated equal to or higher than the lowest rated Contractor originally awarded a BPA within the Pool being applied for.

7.0 Reporting Requirements

The contractor shall identify a Program Manager, who shall be designated as Key Personnel, that provides management, direction, administration, quality control, and leadership execution of all Task Orders (inclusive of CTAs) under the BPA. This includes the management and

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oversight of Project Manager(s), contractor personnel, subcontractors and teaming arrangements necessary to satisfy the requirements identified each task order. The Program Manager shall:

- Coordinate a Kickoff Meeting within 10 days of the BPA award identifying Key Personnel, roles, responsibilities, workflow process, quality controls, and team members and stakeholders.
- Prepare a BPA Level Monthly Status Report (MSR) due by the 10th of each month in ITSS (inclusive of all CTA members) identifying the following: list of all active task orders, the cumulative dollar amount of active task orders, the cumulative dollar amount of all task orders, PoP Dates of active task orders, all open and anticipated problems for all task orders, Key Personnel changes (from Task Order), and overdue invoices, deliverables, tasks, and travel requests.

8.0 Support Items

CMSS BPA vendors may utilize SIN 874-5 Ancillary Supplies and/or Services to provide a total solution if needed at the Task Order level if authorized by the Ordering Activity. Contractors for which a BPA is established pursuant to this RFQ are required to make ancillary supplies and/or services available at the same price, without additional fees or markups. Follow the guidance and procedures in SOW Attachment 4 – FAR 51 Deviation Ordering Guide for obtaining Ancillary Supplies and/or Services via FAR 51 Deviation authority.

9.0 Travel

All travel costs associated with the performance of specific Task Orders shall be invoiced and reimbursed in accordance with the Federal Travel Regulations (FTR). Travel requests shall be pre-approved in writing by the OCO prior any travel. These costs are directly reimbursable by the Ordering Activity if written approval was obtained in advance and specifically authorized in the Task Order.

The Government shall NOT be charged G&A fees for any travel, unless other procedures are specified in the underlying GSA MAS contract.

10.0 Restrictions on Other Work

CMSS BPA Contractors and Subcontractor are only authorized to accept instructions, interpretations, or requests for work; honor any changes or revisions which may incur expenditures or affect price; or take actions which affect the terms of performance from the BPA CO for BPA issues or an OCO for Task Orders.

11.0 Task Order Level Pricing Quotes

The CMSS Labor Rates established upon BPA award shall take precedence over any newly awarded or revised Schedule rates. The quoted CMSS Labor Rates will establish the maximum allowable rates for Task Order requirements and will be published within the Government after BPA award.

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12.0 Contractor Key Personnel

Any changes to personnel listed as key must be approved by the BPA CO. An administrative modification to the BPA is **NOT** required for such changes. The changes will become effective upon an e-mail from the BPA CO approving the changes. Changes to Key Personnel established at the Task Order Level shall be done so at the discretion of the OCO.

13.0 Agency Ordering Procedures

See SOW Attachment 1 – Ordering Guide. These procedures are intended for Ordering Activities issuing orders under this BPA. GSA reserves the right to modify these ordering procedures at any time (e.g., change them to reference a website for further guidance, make changes based on regulation changes to FAR 8.4, etc.). SOW Attachment 4 – TO SOW Template is the required format for Task Order requirements and includes considerations for Ordering Activities.